

Gate keepers

**How designers add value
in the fast fashion process**

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**Gatekeepers -
How designers add value
in the fast fashion process**

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Abstract

The topic of my thesis is the value added by the designer in the fast fashion industry. The fast fashion phenomenon has made a significant impact on the fashion industry in the past two decades. However, there is little research done focusing on the design and the designers in the fast fashion industry. The purpose of my study is to address the fast fashion phenomenon from the designer’s perspective.

My research question is: How do designers add value in the fast fashion process? To answer this I interviewed five designers working in the fast fashion industry in four countries.

Fast fashion is defined with three elements: quick response, frequent assortment changes and fashionable design at affordable prices. In the core of a successful fast fashion strategy are forecasting customer demand and reacting to emerging trends that drive the fast fashion product offering. These functions lay largely in the hands of designers.

The key findings of my study show that designers add value in the fast fashion process through the two roles they adopt: the strategic gatekeeping role and the practical executor role. The designer is a gatekeeper between the trends and the end product using customer, company strategy and brand as frame. The executor role is implementing the strategy in prac-

tice to make products that represent the value proposition of the company. These roles act as a pair for professional designers and value is added in all the phases of the fast fashion process, from the idea to the end product. Both, the idea and the execution must be successful to add value.

The results of my study show that the designer’s role in the fast fashion industry goes beyond the actual product design. Fast fashion designers are creative and business savvy designers who are sensitive to consumer needs and emerging trends. The dual role of the designer is a noteworthy finding of this study and it solidifies the importance of design as a strategic function and designers as strategic thinkers and doers in the fast fashion business.

Nixon and Blakley (2012,. Fashion Thinking: Towards an Actionable Methodology. Fashion Practice, 4(2), 153-175.) present the idea of “fashion thinking” as means for brands and services to attain value by incorporating the analytical and intuitive thinking from the fashion industry. The findings of my study support the idea of fashion thinking and present the fast fashion designers as fashion thinkers, especially through the gatekeeping role. Fashion designers should realize their full potential as creative, trend sensitive and adaptive creatives and apply their skills in industries other than fashion to embrace new career opportunities.

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1 Introduction

The topic of this thesis is the value added by the designer in the fast fashion industry. Forecasting customer demand and reacting to emerging trends that drive the fast fashion product offering are at the core of a successful fast fashion strategy and these functions lay largely in the hands of designers. The key findings of this study show that designers add value by adopting two roles: the strategic gatekeeping role and the practical executor role. The designer can be seen as a strategic gatekeeper between the trends and the end product, using the customer, strategy and brand as frame. Designers interviewed for my study regard this as their main responsibility. The executor role is implementing the strategy in practice to make products that represent the value proposition of the company. Value is added in all the phases of the fast fashion process, from the idea to the end product.

I wanted to focus on the fast fashion phenomenon in my thesis since I felt it was a dynamic, creative and savvy world that was underappreciated. My take on the thesis work is somewhat different from the usual graduating student. I have been working for the past eight years as a designer in the fast fashion industry. It was clear to me that I wanted to utilize my industry experience in the selection of my topic because I could go deeper than a new student could. With this thesis I wanted to challenge myself in a new academic way.

The resources used to spot trends by designers in the industry are more or less the same from company to company. Nevertheless, some fast fashion companies produce interesting and creative interpretations of the fashion zeitgeist and some are just flat copies with poor qualities and fit. It started to interest me how designers translate the relevant elements of the trend to novel products related to the trends.

With my history as a fast fashion designer in international companies I have the background to understand the concepts and practices behind this fast moving and dynamic industry. I want to deepen my understanding of this phenomenon beyond the practical level. My thesis work deals with the trend-driven fast fashion industry and how designers add value in the process and to the end product.

1.1 WHY STUDY THE FAST FASHION PHENOMENON?

The fast fashion phenomenon has made a significant impact on the fashion industry in the past two decades (Bhardwaj & Fairhurst, 2010) yet still it remains somewhat understudied. Fast fashion is often defined by three elements: quick response, frequent assortment changes and fashionable design at affordable prices (Caro & Martinez-de-Albéniz, 2014). The first two elements are operational whereas the third; fashionable design, is a value proposition. Fast fashion began as a quick response production system to meet the changing customer needs and reduce seasonal stock but is nowadays characterized even more as highly trend-driven and even mass exclusive by producing limited quantities of products. Drawing from the foundations of quick responsiveness the fashion industry has shifted from forecasting future trends to utilizing real-time data to understand customer needs and desires (Bhardwaj & Fairhurst, 2010). Fast fashion is a strategy for the most fashionable product offering in the company's portfolio.

Existing research on the fast fashion phenomenon is mainly focused on supply chain management, business models and consumer behavior. Fast fashion has also been studied in some extent in the contexts of corporate social responsibility and copyright. Sources on the topic are mainly articles published in the academic journals such as the Journal of Fashion Marketing and Management. It seems that the current focus on the research is on the environmental and social responsibility issues.

The literature on the fast fashion phenomena recognizes the critical role of successful trend spotting and product design as part of the fast fashion strategy. It is the so-called “all or nothing” proposition, by which they mean that a product’s success is measured only by its ability to respond to customers hunger for trends (Caro & Martinez-de-Albéniz, 2014). The role of the designer is to spot the triggers for demand and create the design inside the framework of the fast fashion supply chain and company strategy. How designers do this is a mystery even to the fast fashion researchers. There is very little research on the topic of design in the fast fashion industry. Neither has design research addressed the fast fashion design process or phenomenon.

I find this gap in the field interesting and this study addresses the fast fashion phenomenon from the designer’s perspective. The fast fashion industry employs many fashion designers and it is important to understand the role they have and the value they add.

1.2 OBJECTIVES OF THE STUDY

My research question is as follows:

How do designers add value in the fast fashion process?

My study aims to find out how designers in the fast fashion industry meet the expectations of their working environment. This study provides new understanding of a fashion designer’s strategic role in the fast fashion value chain. Forecasting customer demand and reacting to emerging trends that drive the fast fashion product offering

are at the core of a successful fast fashion strategy and these functions lie largely in the hands of designers.

In companies the buying decisions are made in teams consisting of several roles, like buyer and merchandiser, but this study is limited to the roles of designers and what is the value this occupation adds.

My thesis is a qualitative research and uses semi-structured interviews as data. I will use this research strategy to answer the research question.

1.3 STRUCTURE OF THE STUDY

This thesis is divided into seven chapters. In the introduction chapter I present the topic of my research and my framing, my objectives and the research question. In the second chapter the relevant concepts and theories are discussed. Chapter three focuses on the methods, and data collection and analyzing processes. The findings of the study are presented in the fourth, fifth and sixth chapters. In the seventh chapter I draw conclusions and discuss the relevance of my findings and some prospects for future research.

2 Fast fashion industry

This chapter positions the fast fashion phenomenon within the global fashion industry. It helps to understand the reasons behind the emergence of this phenomenon and the current business and design strategies that determine the environment in which the designers in the industry operate.

First I review the concepts related to fast fashion, the fashion system and the fashion industry, as well as the key processes. Then the emergence of the fast fashion phenomenon is examined through literature. The fast fashion business strategy is presented from a financial and operational point of view, as well as design point of view.

2.1 THE FASHION SYSTEM

Fashion has been studied widely from sociological to psychological sciences. It has been seen as a societal phenomenon (Blumer, 1969; Bourdieu, 1984; Brenninkmyer, 1963), symbolic (Horn, 1975) and a social phenomenon (Simmel, 1957). At the core of fashion are the concepts of change and newness. Fashion adds value in an intangible, symbolic way, and exists only in people's imagination (Kawamura, 2004).

Kawamura (2004) determines fashion as an institutionalized system in which individuals, like designers and other fashion professionals participate in a collective action. They share the same beliefs in fashion and participate together in producing and fulfilling the ideology of fashion and fashion culture that is sustained by continuous production of fashion. (Kawamura, 2004)

Fast fashion embodies people's urge for change and newness in an extreme form

of the fashion industry. It strives to serve customers with the latest fashions as they emerge. In order to comprehend fast fashion it is important to first understand the mechanisms of fashion, trend adoption and diffusion.

Diffusion of fashion

Diffusion of fashion means the spread of fashion within and across social systems. Whereas the adoption process focuses on individual decision-making, the diffusion process centers on the decisions of many people to adopt an innovation. How fast and how far an innovation diffuses is influenced by several factors like mass media communications, personal communications among adopters and potential adopters, the persuasive influence of consumer leaders and the degree to which the innovation is communicated and transferred from one social system to another. (Kawamura, 2004; Rogers, 1983; Sproles & Burns, 1994)

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At the core of fashion are the concepts of change and newness. Fast fashion embodies the people's urge for change and newness in an extreme form of the fashion industry.

In the context of clothing fashion adoption, innovativeness and opinion leadership are highly related (Kawamura, 2004). Consumer leaders, including fashion innovators, opinion leaders and innovative communicators are crucial in initiating and spreading the process of adoption and diffusion of fashions (Sproles & Burns, 1994). Industry change agents, such as designers and manufacturers, promote the adoption and diffusion of fashion innovation on behalf of their employers (Sproles & Burns, 1994).

Three theories have been suggested for the process of fashion diffusion from one element of society to another. It is also referred to as the leadership theory describing how different groups of consumers lead and initiate the fashion process. Each theory identifies the consumers that are the first to adopt a style and how the styles spread from these leaders to other consumers. (Sproles & Burns, 1994)

The trickle-down theory is the oldest theory and is based on the idea that fashion is an elitist phenomenon and initiated in the highest socioeconomic classes and later copied by lower classes (Kawamura, 2004; Sproles and Burns, 1994). This theory depends on a hierarchical society that is striving for upward mobility among the social ladders. The theory also implies that upper classes adopt new fashions as symbols of exclusiveness and differentiation from their social inferiors. The trickle-down theory has a strong historical background and has a long history of support. Nowadays other theories present new explanations for a more contemporary fashion leadership (Sproles & Burns, 1994).

The trickle-across theory is also called the mass-market theory. It refers to a horizontal flow between the social classes. As a result of mass production, marketing and mass communication, new styles are simultaneously available to all social classes and are spread across each social class. It is based on the hypothesis that fashion leadership comes from a person's own peers and social class, and not from higher status persons. Modern marketing and communication have created favorable conditions for mass fashion acceptance. (Sproles & Burns, 1994)

The most recent theory in fashion diffusion is **the trickle-up theory**. It had its birth in the 1960s and early '70s with the emergence of subcultures in Europe and America (Sproles & Burns, 1994). Sproles and Burns (1994) also refer to this theory as the subcultural innovation theory. The trickle-up theory suggests that new styles originate from lower status segments or subcultures, and then diffuse upwards to the mass population (Sproles & Burns, 1994). To be adopted by larger audiences innovations must be discovered and promoted (Kawamura, 2004). When a style that originated in subcultures is diffused to mass population other methods like mass-market mechanisms may take over in making it available to consumers (Sproles & Burns, 1994).

The fashion cycle

For something to become fashion it must first be introduced to a group of people. Then it must be accepted by a majority within that group and ultimately become rejected by that group to make room for a new innovation or style (Yurchisin &

Johnson, 2010). Rogers (1983) writes that innovation is an idea, practice, or object that is perceived as new by an individual or other unit of adoption. Sproles and Burns (1994) determine fashion innovation to be a style or design perceived new by an individual.

This process of introduction, acceptance and then rejection is often referred to as “the fashion cycle” (Yurchisin & Johnson, 2010). This fashion cycle is often illustrated with a bell shaped curve, see figure 1. Rogers (1983) originally presented this curve in 1962 as an “Innovation adaptation curve”. The curve demonstrates how a number of individuals are willing to accept an innovation in relation to time. The vertical axis represents the number of

adopters as represented by their purchase of the item. The horizontal axis represents time. (Rogers, 1983; Yurchisin & Johnson, 2010) Different attributes can be linked to the different adopter categories presented in the curve.

The first to adopt the innovation, like a new fashion apparel or style, are referred to as **fashion innovators**. They are ventures and very eager to try new ideas and are the first ones to display a new product, thereby bringing attention to it (Rogers, 1983; Yurchisin & Johnson, 2010). They are often creative consumers who invent looks for themselves and may even have contributed to the creation and promotion of the innovation (Sproles & Burns, 1994). They are looked at and copied for their fashion

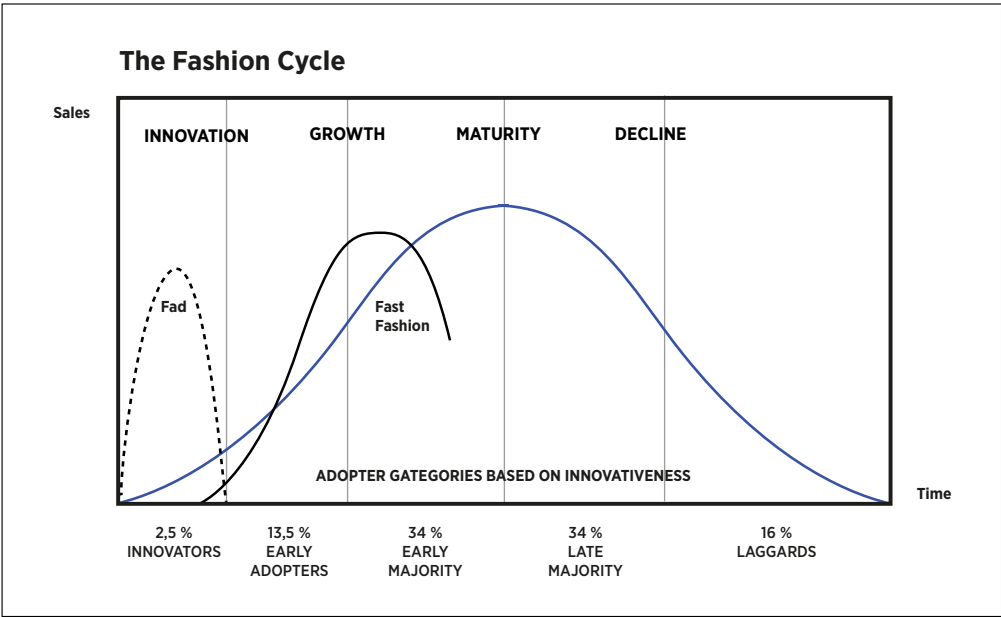


Figure 1. The fashion cycle. Source: Adapted from Rogers (1983) and Yurchisin & Johnson (2010).

leadership. Innovators can come from any walk of life but celebrities have more potential to be fashion innovators for their exposure and popularity (Yurchisin & Johnson, 2010).

The next group to adopt the new styles and products are **early adopters**. Early adopters are also willing to try new ideas but early adopters are more cautious in adopting an innovation (Yurchisin & Johnson, 2010). They are more connected to social systems than innovators and have a great degree of opinion leadership. The early adopters are looked up to by their peers for advice and confirmation (Rogers, 1983). They socially legitimize the acceptance of the innovation (Sproles & Burns, 1994).

As diffusion accelerates the cycle moves to a third category dominated by mass-market consumers (Sproles & Burns, 1994). **Early majority** adopts ideas just before the average member of the social system. Early majority has a unique point between the very early and the late adopters linking the diffusion process (Rogers, 1983). They are not the first to use the new idea but wait to see many other individuals use it first (Yurchisin & Johnson, 2010). They follow a deliberate willingness in adopting the innovation but seldom lead (Rogers, 1983). During this time the style becomes well accepted and widely available in stores and adopted by largest number of consumers (Sproles & Burns, 1994). This is a group that large mass-market retailers seek for increased revenues and it is in the core of many companies target customer.

Eventually the adoption levels off and the diffusion curve begins to ascend (Sproles

& Burns, 1994). Individuals who adopt the fashion at this time are called the **late majority**. They are skeptical and adopt it just after the majority of people (Rogers, 1983). They wait until the innovation has become a norm and it has been firmly confirmed by the mass-market (Rogers, 1983; Sproles and Burns, 1994). At this point most others have already accepted it (Rogers, 1983). It could also be an economic necessity since the price of the innovation is usually lower than in earlier stages (Rogers 1983, Yurchisin & Johnson, 2010).

At this stage the innovation is not likely to be referred as innovation anymore. The only people who have not accepted it at this time are called **laggards** or isolates (Rogers, 1983; Sproles & Burns, 1994; Yurchisin & Johnson, 2010). Laggards tend to be traditional people who are critical to new ideas (Yurchisin & Johnson, 2010). They might be pressured by peers or motivated by the low price (Sproles and Burns, 1994; Yurchisin & Johnson, 2010). They might have wished to adopt the innovation in an earlier stage but due to their economic situation they have to wait until it is discounted (Sproles & Burns, 1994).

The curve illustrating fashion cycle and innovation adoption helps retailers better predict sales and profitability of a product (Kim, E., Fiore, & Kim, H., 2011). The curve also suggests that the group attaining most commercial potential is the early majority since they precede peak demand and show a rising curve with mass-market potential. It has also been used to describe the retail shopping behavior, fashion marketing and price structure of new products (Sproles & Burns, 1994; Stone, 2007). It is usually perceived that exclusive designer shops and better department stores cater to

the innovators and early adopters at high prices. Mass-market retailers are focused on the early majority and late majority at affordable prices and mass production. Late majority and laggards shop in super-markets and outlets and are most motivated by price (Sproles & Burns, 1994; Stone, 2007). The curve helps companies to position their target customers and collections in terms of fashion innovativeness and market volume potential. Fashionable products are targeted to more innovative consumers and basic and classic products to more skeptical ones (Sproles & Burns, 1994; Yurchisin & Johnson, 2010).

This is still valid thinking for the majority of the fashion industry. However the dynamics of the fashion industry are changing and companies like H&M and Topshop are luring the more fashion-forward consumers in the early adopter categories with fast fashion and catwalk collections. Kim et al. (2011) also suggest that fast fashion retailers and the Internet accelerate diffusion of new styles.

There are variations to the fashion cycle. Fad is a common term used to describe an innovation that becomes popular very quickly by a relatively large group but remains accepted only for a brief period of time and dies out quickly (Kim et al., 2011; Sproles & Burns, 1994). Fads appear suddenly and take us by surprise and are short-lived, measuring up to weeks or months at tops (Stone, 2007). Fads may be revolutionary in design contradicting the current direction of fashion. They can also rise from subcultures and youth culture. An example of a recent fashion fad could be the armpit coloring matching hair color that emerged in late 2014 and went on for a few months until 2015 (Ferrier, 2014).

Fad is presented in figure 1 in relation to the fashion cycle.

The fashion cycle for fast fashion is between the fad and the fashion. It is more short-lived than fashion but more mainstream than a fad.

Basic products and classics are items that remain popular with many people for a long time with some slight variation in detail. Examples of classics are the Levi's 501 jeans, trench coats and button down shirts (Kim et al., 2011). These styles are often basic and simple in design and therefore likely to be adopted by various social groups (Kim et al., 2014; Nuutinen, 2004; Sproles & Burns, 1994).

2.2 THE FASHION INDUSTRY

The fashion industry involves businesses that are engaged in manufacturing the materials and finished products used in the production of apparel and accessories for women, men and children. In a broader concept it can be thought to comprise all industries and services connected with fashion; design, manufacturing, distribution, marketing, retailing, advertising, communications, publishing and consulting (Jackson, 2007; Stone, 2007).

The fashion industry, comprising the apparel and textile industries, is one of the biggest global industries. In 2012 it was worth 1.7 trillion US dollars and employed approximately 75 million people worldwide (fashionunited.com). In fact the largest fashion retailers in the world in 2012 were fast fashion companies Inditex (Zara) and H&M (Caro & Martinez-de Albeniz, 2014).

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Figure 2 illustrates how the different levels of fashion industry from raw material production to the end consumer and fashion communication interact with each other (Stone, 2007).

Fashion season refers to the period of time during which the fashion products are sold. Historically there has been two clearly defined traditional seasons, namely the spring/summer (S/S) and autumn/winter (A/W). Retailers have organized themselves around a consumer demand that is driven by weather (Jackson, 2007). This however is being challenged as fashion industry is becoming global in the retailing end and the old

weather-based seasonality is very Europe centered (Cochrane, 2013). Nevertheless, these seasonal terms are still very much in use since they are firmly integrated in the culture of fashion (Jackson, 2007).

However, there has been pressure to increase the number of seasons. The first to add new seasons or deliveries were mid-market and value retailers in the 80s and 90s (Bailey, 1993). Fast fashion has also made the bi-annual seasons irrelevant for some brands, as collections are renewed monthly or even weekly (Jackson, 2007). Retailers still refer to S/S and A/W at large but most fashion retailers have organized their calendar according to periods that

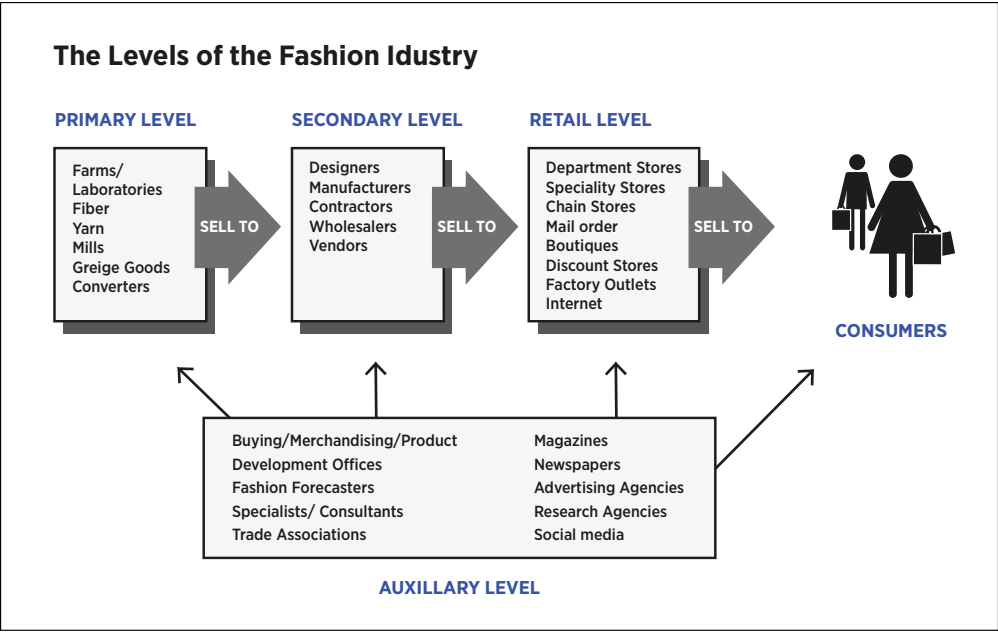


Figure 2. Different levels of the fashion industry. Source: Stone (2007).

are linked to more specific user occasions. Seasons still give the possibility to renew their offering but more frequent changes create even more newness and provide a possibility to monitor the performance of the products in more detail. Figure 3 demonstrates a UK-based fashion retailer's approach to seasons. (Jackson, 2007)

Haute couture designers still keep the traditional bi-annual seasons and show their collections twice a year. Ready-to-wear designers and brands also show their main collections bi-annually, but in recent years they have started to produce pre-season collections as well.

These pre-collections and resort collections are partly a response to fast fashion and customers' hunger for renewal but they have also proven to be more commercially viable than the main collections by generating more revenues. Designer brands like Acne and Stella McCartney have started to deliver even smaller collections for specific times like high summer, learning from the fast fashion companies' periodical season plan. Burberry has introduced even more direct and innovative means to compete with the fast fashion offering. They have developed a "Runway to reality" concept where a customer can order a product directly from the runway show and get it in eight weeks.

The Changing fashion retailer seasons in the UK	
SUB SEASON	PERIOD
Early spring	January/ February
Spring (events e.g Valentines Day)	February/March
Early Summer	April/May
Summer	May/June
Summer Sale	June
High Summer	June/July
Transitional Autumn	July/August
Back-to-School/Work	August
Autumn	September/October
Party wear	November
Christmas /Transitional Spring	December
Winter Sale	December/January

Figure 3. Retailer seasons in the UK. Source: Jackson (2007).

While fashion industry still revolves around the main seasonal fashion shows their significance has become more of a way to gain exposure and a brand communication tool. (Cochrane, 2013)

Figure 4 illustrates the delivery to store and selling period of main fashion collections and pre-collections.

2.3 TRENDS AND THE TREND CYCLE

Trend refers to a general direction or movement (Stone, 2007). Fashion trends refer to aspects of appearance and construction of fashion products that relate to a particular season (Jackson, 2007). Trend information guides different stages of the fashion industry from the production of raw materials to the garment production and marketing.

In the fashion industry it is hard not to encounter trends discussed in the public domain. A fashion magazine will present key trends for the summer or inform readers that there is a trend towards faux furs (Kim et al., 2011). A trend describes the movement of innovations in the adoption curve, namely the fashion cycle (Yurchisin & Johnson, 2010). In the case of faux fur this would mean that an upscale designer had introduced faux fur coats or details on the runway, that other apparel retailers have started to introduce the faux fur items in their stores and catalogues, and that some fashion-forward consumers have started to wear them (Kim et al., 2011). An item can be trending upwards and gaining more acceptance or trending downwards and declining in acceptance (Yurchisin & Johnson, 2010). Trends as well as fashion are not limited to apparel or accessories and can be found in other

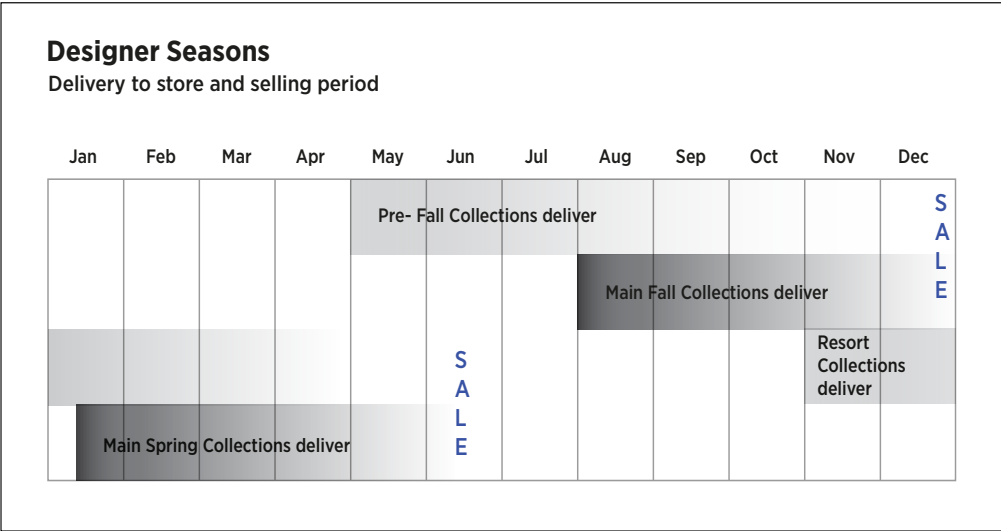


Figure 4. Designer and ready-to-wear seasons.
Source: Adapted from www.bridgeshowroom.com (2012).

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Fashion forecasting is a creative and continual process and also involves systematic procedures like information gathering, market and consumer research and analysis.

consumer products like furniture, electronics and food (Kim et al., 2011). In my study I am focusing on fashion apparel trends and forecasting for product development purposes.

Instead of radical, complete transformations, the changes in fashion are most often gradual and evolutionary (Sproles & Burns, 1994). Consequently, even though fashion trends are predicted for each season, most trends have longevity because a particular look can last for several seasons before the trend reaches saturation. Examples of this could be certain colors, a garment shape, or focus on a specific area of the body like the midriff. Industry also wants to exploit particularly successful shapes or styles and that can also extend the longevity of the trend. Through varying emphases and interpretations the evolution of trends can last over a number of seasons (Jackson, 2007).

Knowing what customers will want is essential for success in the fashion business because the research and the design

process for any product starts up to one year prior to the selling season. Fashion change is influenced by various factors such as social, cultural, economic and technological factors. Forecasting fashion trends is not a simple task when all the above factors need to be considered. Fashion forecasting is a creative and continual process and also involves systematic procedures like information gathering, market and consumer research and analysis. (Kim et al., 2011)

Trend development process over a season

Designers and other professionals in the creative industries can access commercial trend information through trend-forecasting companies like WGSN (Kim et al., 2011). Many companies use these agencies to get a global view of the market but also use their own in-house forecasting teams to create more original and company or target customer specific trend forecasts. In general, trend services provide an overview of the coming season including information on consumer attitudes, key design features,

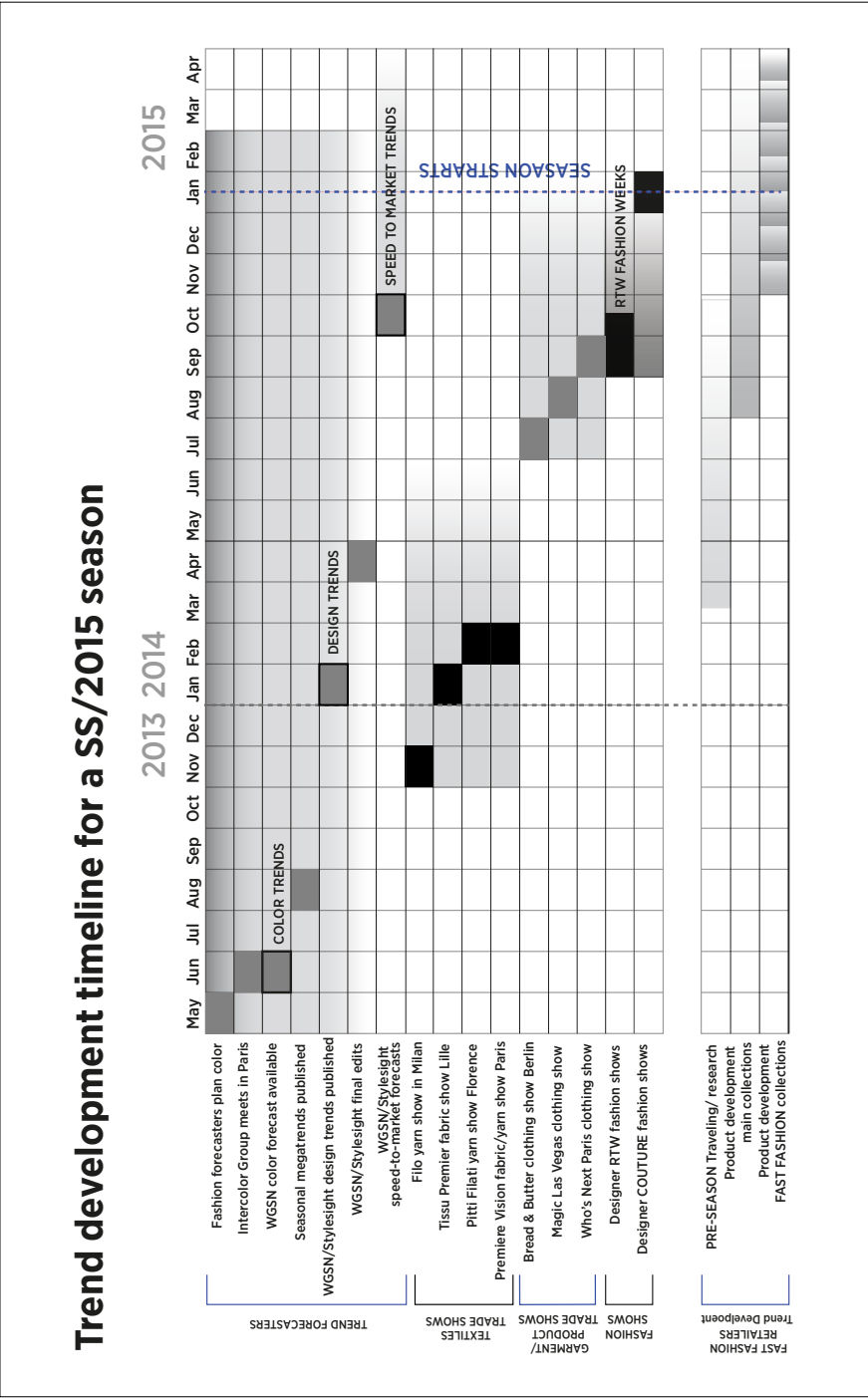


Figure 5. Trend development timeline for a SS/2015 season. Source: Adapted from wgsn.com and Jackson (2007).

patterns, styling, materials and color palette. Together this information provides a clear visual interpretation of the season's design themes (Kim et al., 2011).

Identifying and analyzing trends is the first step in new product development and the earliest views on trends are created some 18-20 months in advance of the intended season (Kim et al., 2011; Jackson, 2007). In figure 5 below the trend development process for a fashion season is illustrated in a timeline.

The first elements to be considered are colors and materials used by the raw materials industry. Yarn mills and fabric weavers develop textiles based on this information before the garment and design industry can make clothes out of them (Jackson, 2007; Kim et al., 2011). Product or style forecasting starts about 12 months prior to the season. However the current increasingly short fashion cycles demand a shorter forecasting cycle (Kim et al., 2011).

The process of a forecast becoming a product has several decision-making stages followed by trade shows and fashion shows that follow a determined sequence and are intended for a specific season. Trade shows are typically yarn and fabric shows, like Pitti Filati or Premiere Vision, displaying the available new materials and colors to designers, brands and retailers. Designers and high-end brands typically start their product development process based on this level of trend information. (Jackson, 2007)

After the raw material shows, the trade shows displaying garments by brands and independent designers proceed. Examples of these shows are “Magic” in Las Vegas

and “Bread and Butter” in Berlin (Jackson, 2007). These trade shows are intended for buyers from department stores and independent shops to place orders with brands so they can order the production from factories. They also serve as confirmation and indication of color, fabric, silhouette, new product and styling for the season. (Jackson, 2007)

The Ready-To-Wear (RTW) fashion shows held by top designers during the fashion weeks provide the last opportunity for fashion retailers and brands to incorporate styling changes or must-haves into their product ranges (Jackson, 2007). The international fashion weeks have a fixed calendar and are held generally half a year in advance of the intended selling season. The autumn/winter RTW fashion weeks start from New York in February every year and finish off in Paris in early March, after London and Milan.

Trend forecasters often provide confirmations, analyses of key pieces, materials and speed-to-market (fast fashion) flash trends after the RTW fashion shows. Fast fashion retailers still have a chance to pick up on new things at this stage since they produce garments for their own shops at their own desired pace and do not have to go through a wholesale process.

The final fashion look is therefore the result of a development process that combines the evolved views of forecasters, textile and product trade shows, designers, buyers and RTW shows. The final picture emerges after all the various elements and layers have come together. Media coverage of the RTW shows provides consumers with views of a new season's looks and trends. (Jackson, 2007)

Fast fashion retailers trend research process

For fast fashion retailers, the In-house designers are usually the group conducting the trend research prior to the season with the help of trend agencies and other resources. Early fashion ideas come from many sources including:

Traveling to fashionable shopping locations in foreign cities to buy or photograph samples for inspiration.

Researching competitor and benchmark channels like stores, catalogues and websites for pricing, new styles and packaging.

Researching vintage fashion and old fashion shows and secondhand fashion for trend ideas ahead of time.

Specialist and fashion magazines.

Using customized forecasting services and trend books like WGSN or Promostyl.

Visiting textile shows like Premiere Vision.

Visiting garment shows like Bread and Butter.

Following RTW fashion shows.

Following fashion-related social media.

This information is synthesized and analysed keeping in mind the specific needs of the brand and target customer to create a new product range for the coming season. Selling history can also provide valuable data relating to best and worst styles, sizes and colors. (Jackson, 2007)

As illustrated in figure 5 the fast fashion retailers have a slightly longer research and development process for their main collections than for fast fashion products. Fast fashion designs are created after the trends have been confirmed in the RTW shows. Fast fashion trends can also emerge outside this seasonal process. With a faster-than-normal production process these trends can be delivered to shops as they emerge.

Why is the trend cycle becoming faster?

Industry talks about the acceleration of the trend cycle almost as a force of nature and a self-evident phenomenon. However, there are several traceable reasons for this development. The accelerated trend cycle is actually an accelerated product innovation and diffusion cycle. Both the industry and the consumers contribute to this change. Kim et al. (2011) point out several reasons for the acceleration of the cycle:

Consumers have access to vast amounts of design and trend information. It enhances consumer confidence as they make fashion decisions thus accelerating adoption and innovation.

Mass-market consumers expect high price point fashion innovations to diffuse quickly to lower price points. This drives product innovation as lower price point design changes quickly to keep up with the changes in high-fashion design, reinforcing change in the latter as they strive to keep their product unique. This is often referred to as the effect of fast fashion retailers.

Technological advances in partnerships between businesses, such as suppliers and fashion companies. This has led to more responsive production systems and has enabled companies to rapidly respond to consumer trend, thereby accelerating the delivery of fashion trends.

Digital technology is accelerating opinion leadership and innovation diffusion, as consumers are more than just shoppers. They are also a source of information that facilitates the innovation adoption process. Consumers increasingly look at their peers rather than traditional advertising for product advice and information.

(Kim et al., 2011)

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Fast fashion designs are created after the trends have been confirmed in the RTW shows.

2.4 FASHION DESIGN AND THE PRODUCT DEVELOPMENT PROCESS

Design provides creative, technological and commercial input in a total market environment in order to satisfy future market requirements. The design process for apparel involves gathering and analyzing information on fashion trends, markets and past line sales, and considering ideas for successful combinations of fabric, style and price. It is a multidisciplinary process that requires collaboration between the different functions of the company. Knowledge of design, materials and processes are necessary to follow through the next phases and ultimately create new products. (Le Pechoux et al., 2007)

Carr and Pomeroy (1992) and Gaskill (Wickett, Gaskill & Dahlsrud, 1999) have presented theoretical models for the apparel and design development processes. These processes can be divided into two basic phases. The first phase includes the trend analysis and design concept development, and during this phase information is probed for orientation of ideas regarding moods, themes concepts and product types (Le Pechoux et al., 2007) as explained earlier.

In the second phase all this data is digested and translated into product ideas combining silhouettes, materials and colors. These activities are related to more practical design elements and use the design skills and principles along with knowledge

of materials and processes (Le Pechoux et al., 2007). Carr and Pomeroy (1992) state that the task of a designer is to represent fashion objectives in a sketch providing instructions to the pattern cutter and production. At this stage of the design process all the required elements such as silhouettes and details like collars and pockets, surface decorations and trims should be determined.

After the trend analysis, the design concept specific for the target market is refined. This includes ideas on a product level and involves indications of shape, color, material and surface decoration. At this stage everything is made into sketches and first prototypes are produced either in-house or at an external supplier.

When the first prototypes arrive they are evaluated based on the business goals of the company and customer expectation. Prototypes are also fitted and altered if changes are needed on a technical level or design concept level. Once the prototype meets the requirements and is approved then it is ready for production and ultimately ready to be sold to the customer.

Figure 6 describes the design and product development process for a single fashion season in a basic industry setting. It is noteworthy that designers usually work with three seasons at a time (Le Pechoux et al., 2007). One season is the trend analysis phase, the second in the design development and sampling phase and the third is the production and retail phase.

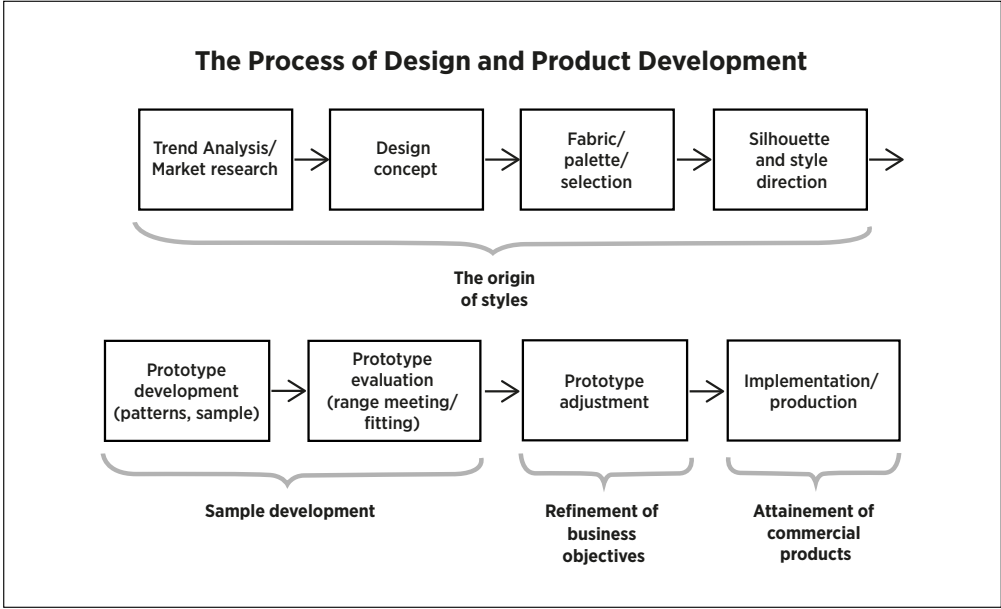


Figure 6. The process of design and product development. Source: Adapted from Carr & Pomeroy (1992) and Wickett, Gaskill and Damhorst (1999).

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Design provides creative, technological and commercial input in a total market environment in order to satisfy future market requirements.

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When I was working as a fast fashion designer at Hennes & Mauritz and Seppällä I was a member of an in-house team composed of a pattern maker and a buyer. The team was responsible for one collection out of many offered by the company.

As a designer I was responsible for trend research, design concept development and product design with required specifications needed to make the garment. I would then pass my design sketch to the pattern maker and explain the key points of the design idea and construction. She would then make patterns and measurements required by the production. She would advise me on the technical solutions for the design and make more detailed technical instructions. The buyer was responsible for the budget and the overall commercial performance of the collection.

The buyer would also select the production facility and source the materials I had indicated for the design. She would negotiate the manufacturing price for the product and based on that set the retailing price and decide the quantity. We discussed the design throughout the process and a lot of the time she would give feedback to me about the design based on sales.

At both companies we had production offices in the countries the garments were made in. These offices employed product developers, merchandisers, garment technicians and quality surveillance personnel. The merchandisers worked with the buyer on pricing and finding a suitable manufacturing facility for the garments. The local garment technician communicated with our pattern maker on issues related to the fit and construction of the design. She would also inform the buying team about the samples and adjustments as well as technical suggestions from the production side.

Some offices, like Turkey, also had product developers. They sent information to the buyer and me and samples of the new materials available. They visited local fabric and yarn shows to collect ideas and forwarded this information to us as well. I sent the trends and design ideas to the product developer so she could source materials and ideas from her local market. When we did fast fashion orders the product developer was the link between the supplier and us. She developed the styles with the supplier based on my design brief.”

- Anna Huoviala, 2015

2.5 FAST FASHION

Fast fashion reacts to emerging trends quickly and tries to deliver them to customers at their peak before competitors (Barnes & Lea-Greenwood, 2006). Assortments are adapted to match these trends as quickly and effectively as possible (Sull & Turconi, 2008). This requires short lead times that are achieved by using quick response and lean supply chains.

Definitions of fast fashion usually include three elements:

- 1. Quick response
- 2. Frequent assortment changes
- 3. Fashionable designs at affordable prices

Caro & Martinez-de Albéniz, 2014; Sull & Turconi, 2008; Bhardwaj and Fairhurst, 2009, Barnes & Lea-Greenwood, 2006; Cachon & Swinney, 2011 Choi, 2013) Choi (2013) also notes that short product life cycles are a key element in defining fast fashion.

This is still quite a broad definition but helps to define companies that can be seen as fast fashion retailers. For example, some retailers have affordable prices but they do not have quick response capabilities (such as Old Navy). Others may have frequent assortment changes, but offer more basic products and not products according to the latest trends (for example Chico’s). Fashionable brands like Prada are much more expensive and the responsiveness of their supply chain is unclear (Caro & Martinez-de Albéniz, 2014).

Emergence of fast fashion

Fast fashion is a relatively new phenomenon in the fashion industry tracking back to the 1980s and ’90s. Its emergence can be seen as a result of changes in the industry and consumer behavior. This section tracks the emergence of the fast fashion phenomenon from an industry and consumer perspective.

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Retailers started to increase the number of seasons from the traditional two to even six to offer more refreshed products to the market.

Industry

Until the mid-1980s, success in the fashion industry was based on low cost mass production of standardized styles that did not change frequently due to the design restrictions of the factories. Changes in fashion styles were more frequent at the high-end such as in haute couture collections. (Bhardwaj & Fairhurst, 2010) Since the early 70s the share of imported garments has started to rise in the markets of Europe and the US (Bailey, 1993). In the late 80s in the US a sudden increase in imported fashion-oriented apparel reduced the demand for classic and simple apparel and consumers started to become more fashion conscious (Bailey, 1993; Bhardwaj & Fairhurst, 2010). Domestic factories that were specialized to manufacture only one type of garment, like a men’s long sleeve shirt, suffered with this new more seasonal demand of fashionable apparel at the expense of basic styles. Retailers started to increase the number of seasons from the traditional two to even six to offer more refreshed products to the market. (Bailey, 1993) However, offering more fashion forward products on a traditional manufacturing schedule – where product decisions were taken up to a year in advance – led to increased markdowns. This came about because of the failure to sell fashion apparel during the intended season (Bhardwaj & Fairhurst, 2010). As a result, it was argued that mass production of fashion products would not lead to increased profits in the fashion business (Bhardwaj & Fairhurst 2010).

Towards the 1990s the offshoring of manufacturing to low-cost countries increased even more under the pressure to lower retail prices as new retailers offering in-

expensive clothing entered the market (Barnes & Lea-Greenwood, 2006). The resulting complex supply chains with long geographical distances still led to long lead times for fashion products. In response the retailers started to focus more on expanding their range with updated products and faster responsiveness to the new fashion trends. This shifted the competitive advantage from price to changing fashion trends and consumer demand (Barnes & Lea-Greenwood, 2006). To increase the variety of fashion products even more phases were added to the existing seasons. The number of planned seasons could reach up to 20, as it did in the case of Zara, in order to respond to consumer demand for newness (Barnes & Lea-Greenwood, 2006). This created pressure for suppliers to deliver smaller batches more frequently and with reduced lead times (Bhardwaj & Fairhurst 2010). This meant a restructuring of the industry to meet the new demands and improve operational performance. Some of the results of this restructuring included the just-in-time and quick response techniques to shorten lead times. Furthermore, information technology improved communication between suppliers, and computer-aided design contributed to the process of reducing lead times.

Drawing from the foundations of quick responsiveness, the fashion industry had shifted from forecasting future trends to utilizing real-time data to understand customer needs and desires (Bhardwaj & Fairhurst, 2010). Fast fashion became a key strategy for retailers to succeed in the modern and highly competitive retail environment (Barnes & Lea-Greenwood, 2006).

The aim to reduce lead times also meant that part of the production was shifted from Far East suppliers and factories to countries closer to domestic markets. Turkey has emerged as a strong fast fashion supplier market due to its cultural and geographical closeness to Europe. Turkey can provide on-trend material and has the technical resources needed for fashion products (Barnes & Lea-Greenwood, 2006). Due to this many companies started utilizing dual supply chains. Quick response and agile supply chains are used for fast fashion products and traditional supply chains for more basic products.

Consumer

Fast fashion is widely understood as a consumer-driven process. It is a competitive response to changes in consumer demand. Even if fast fashion has had a definite impact on supply chains for fashion products it is still clearly driven by customer demand (Barnes & Lea-Greenwood, 2006).

Changing consumer lifestyles, and consequently demands, have created pressure for fashion retailers to provide new design at increased pace. Socio-cultural changes have resulted in a faster pace of living. Consumer needs are changing more frequently and women today change their wardrobes more often than in previous years (Barnes & Lea-Greenwood, 2006). As the consumer market is more fragmented in terms of consumption patterns, fast fashion is gaining importance among consumers, especially young women (Bhardwaj & Fairhurst, 2010).

Mass communication has made it possible for consumers to gain access to information on the latest trends and catwalk styles (Barnes & Lea-Greenwood, 2006). Historically runway fashion has been the biggest inspiration for the fashion industry and the fast fashion industry in particular. Earlier these fashion shows and other industry events, like trade shows, were limited to industry professionals. From 1999 onwards fashion shows and catwalks became a public arena open to normal consumers as style.com was launched (Bhardwaj & Fairhurst 2010; sydeylovesfashion.com, 2008). Fashion-conscious consumers are exposed to exclusive designs and styles and retailers like Zara, Mango, H&M and Topshop adapt these designs quickly to attract fashion-savvy consumers to their stores (Bhardwaj & Fairhurst, 2010).

Celebrity and popular culture have also made a contribution to the increased demand for current styles. Fashion trends are increasingly influenced by culture, subcultures and street fashion, not only catwalk fashions. As fashion trends can emerge anytime from anywhere the trend cycle has become faster and more unpredictable (Barnes & Lea Greenwood, 2006). Moreover, celebrity culture has grown with the addition of fashion bloggers, a phenomenon of the late 2000s.

The current and future developments that increase sharing of information and pictures among consumers will no doubt deepen the bond between consumers, fashion companies and trends.

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Fashion trends are increasingly influenced by culture, subcultures and street fashion, not only catwalk fashions. As fashion trends can emerge anytime from anywhere the trend cycle has become faster and more unpredictable.

Fast fashion pioneers: Benetton and Zara

Benetton

In 1965 Giuliana Benetton and her brother Luciano started a knitwear business of colorful sweaters in Italy. They first sold their products in Italian department stores but soon opened their first own shop and continued to expand through franchising over Italy in the following years. They expanded their product range to cover other fashion items in a variety of materials besides wool. To succeed in the international market they learned to adapt their colors to match local tastes. They also sold their products at a lower price than competitors to attract the mass market.

Benetton integrated their clothing production with retailing through their own production facilities and a complex network of contractors and subcontractors. Managers could switch parts on and off to respond to shifting consumer preferences. At Benetton they also moved the dyeing process to a much later stage so that the colors could be matched more with the customer demand of particular colors. In knitwear production it is common to dye the yarns in a very early stage of the production. This new process made Benetton the first fashion company to be able to change their product range at any scale during the fashion season to satisfy customer trends.

Benetton was much ahead of Zara in their first decades and by 1995 Benetton owned or franchised approximately 8000 stores in 110 Countries. However the fortunes did not continue as favorably in the following decades as Benetton saw their sales stagnate and profitability decrease significantly. They had to reduce their store count and re-engineer their supply chain. Today Benetton is not considered a competitor in the high fashion market. (Sull & Turconi, 2008)

Zara

Zara was founded in 1963 in Spain as a clothing producer of low-priced lookalike products of popular high-end fashions. They also designed their own unique products. Zara's founder Amancio Ortega opened his first retail outlet in 1975. In the short term the idea was to sell stock but the long-term idea was to integrate production and distribution.

Zara built a production network similar to Benetton's but added their own enhancements to it. They maintained the capital-intensive tasks in house, like computer-aided fabric cutting, and subcontracted the labor-intensive tasks to a variety of local subcontractors. Many of these were organized seamstress cooperatives in Galicia. Having shifted most of the production to subcontractors Zara was able to respond quickly when items sold better than expected. They were also able to cut production when demand fell.

While Benetton was much more aggressive in their expansion in the first decades, Zara had only 500 stores in 1995 and three quarters of them were located in their home market of Spain. The next decades the situation reversed and by 2006 Zara was present in 63 countries and their parent company Inditex had over 3000 stores. The sales had grown sevenfold and Zara's profitability was among the highest in the industry.

One reason given for Zara's success is that they kept much of their production of fashion items close to their key markets to keep flexibility and maintain short lead times. In 2008 they still had up to 50% of their production close to Spain. Zara is also famous for not paying for advertising in television or magazines. Neither has Zara jumped in on the trend to collaborate with famous designers like many other fast fashion retailers. Instead, Zara has focused on the store windows to convey their brand image and locates their stores in the best locations in cities they enter. Zara's customers have also learned that items are carried in limited stock and therefore must be purchased immediately before stock runs out.

Zara has an extensive internal information-sharing organization that utilizes design and trend input as well as current sales data to facilitate quick product decisions. They also have a flat decision-making structure and react extremely quickly to trends. Moreover, Zara has a capacity to produce prototypes of product ideas in hours opposed to competitors' weeks. Orders are placed in factories located nearby that are capable of getting the product in stores in weeks. They employ a larger in-house design team than their rival H&M (Ghemawat et al., 2003). They also have a very efficient logistics network that delivers new products in small quantities to stores twice a week; thus reducing the need for inventory. Zara has created a unique operational system playing against many industry standards like outsourcing and mass orders. (Sull & Turconi, 2008)

2.6 FAST FASHION STRATEGY

Fast fashion retailers combine supply chain agility to respond quickly and constant product introduction to attract variety-seeking fashion-conscious customers (Caro & Martinez-de Albéniz, 2014). This has led to a specialist strategy for fast fashion companies.

I have divided fast fashion strategy into three parts in this study. First I will review the business strategy, then the operational strategy and finally the design strategy in light of the literature. Fast fashion strategy is a seamless outcome of all these three elements working together.

Business strategy

For several years the fast fashion sector has had higher growth than the fashion industry on average (Sull & Turconi 2008). Fast fashion companies are reporting profit increases and expansion plans (Kell, 2015). Mainly because of this, fast fashion has become a key strategy for many retailers to manage the modern retail environment.

Fast fashion is a strategy suitable for a certain type of fashionable product and does not apply to a whole product range (Bruce & Daly, 2006). Trendy garments in smaller volumes are suitable for fast fashion since they have to be in stores at the peak of their demand (Caro & Martinez-de Albéniz, 2014). As much as 80% of products can be basic or core lines that are produced with longer lead times and life cycles. What is needed is a blend of close-to-market suppliers for introduction of products in mid-season and long distance suppliers for lower-cost basic and volume products (Bruce & Daly, 2006).

The key business advantages of fast fashion strategy include reduced end-of-season stock, lower markdowns and fast turnaround and as a result increased gross margins. Fast fashion strategy aims to reduce the advance forecasting risk moving the product decisions closer to delivery (Bruce & Daly, 2006). Fast fashion forecasts can of course go wrong as well, but the risks are divided into several smaller orders thus reducing the overall risk.



The key business advantages of fast fashion strategy include reduced end-of-season stock, lower markdowns and fast turnaround and as a result increased gross margins.

Fast fashion retailers also work at an item level. Retailers own wholesale channels, and the control over their offering gives retailers more flexibility in order sizes and delivery cycles. They can introduce products to the store continuously, not only twice or four times a year, and this can generate more customer traffic because fast fashion products also carry a different marketing role than the more basic products. This also allows more balanced utilization of resources like designers, factories and distributors to avoid peaks. (Caro & Martinez-de Albéniz, 2014)

Buying fashion products in volumes and in advance resulted in increased level inventory not sold by the end of season (Bhardwaj & Fairhurst, 2010; Hayes & Jones, 2006). Hayes and Jones (2006) have made a financial analysis of fast fashion retailers compared to non-fast fashion retailers and their study verified the notion that fast fashion strategy is valid for achieving faster stock turnover.

Increased number of seasons has made it possible to buy smaller volumes more frequently, even on a weekly basis. With this, companies aim to reduce risks in forecasting and instead focus on demand. Smaller batches more often can have a sell-through rate of 95%. Even if frequent buying strategy results in higher overall costs it can be benefited in reduced markdown and out of stock sales (Bruce & Daly, 2006). Markdown ratio for fast fashion can be as low as 15 % in comparison to industry average of 50% (Sull & Turconi 2008).

Cachon and Swinney (2010) argue that fast fashion strategy is also beneficial in managing strategic consumer behavior. This means that consumers are forward-looking

and delay their purchase to wait for sales. Some retailers, like Zara, create deliberate product shortages. They let their products be sold out so that customers cannot wait until the end-of-season sales (Caro & Martinez-de Albéniz, 2014, Cachon & Swinney, 2011). Fast fashion mitigates the effect of this strategic consumer behavior (Cachon & Swinney, 2011).

A new development in the fast fashion market is the emergence of online fast fashion retailers, who do not have brick and mortar shops and do their business purely on the basis of their online shops. One of the most famous of these newcomers is Asos.com. Asos has reported huge increases on their year-to-year sales, although in 2014 the company reported fallen profits and issued a profit warning (Selig, 2015).

Traditional fast fashion retailers have been slower to invest in e-commerce and this has opened up space for new businesses (Fellowes, 2009). Even fresher challengers to the traditional retail space are the shopping apps for smartphones (Wood, 2012).

Operational strategy

Fast fashion has the objective of getting the products to stores in the shortest time possible. The supply chain has to quickly produce new products in response to shifting trends (Sull & Turconi, 2008). Short lead times are enabled through localized production, sophisticated information systems and expedited distribution methods (Cachon & Swinney, 2011). Supply chains for fast fashion products utilize the quick response (QR) principle.

The concept of QR is quite simple: all risky production decisions are postponed until there is enough evidence that there is market demand (Caro & Martinez-de Albéniz, 2014). Originally QR set standards for information exchange and supply chain management that allowed lead times to be shortened. They key difference in QR supply chains and a more traditional supply chain is the move towards collaborations, strategic alliances, shared information and vertical integration (Barnes & Lea-Greenwood, 2006; Bhardwaj & Fairhurst, 2010). QR supply chains are considered to be information driven as response is based on sharing information. Utilizing technology in assisting communication between suppliers and retailers has had a big effect on the efficiency of QR (Hayes & Jones, 2006).

Shipping time is one of the factors that provide a possibility to cut time. Since distance is a key factor, products from China can have a shipping time of 22 days whereas products from Turkey have only 5 days. Regions like Turkey, Eastern Europe and India have emerged as fast fashion specialists (Bruce & Daly, 2006, Caro & Martinez-de Albéniz 2014).

Another important factor in cutting the lead times in the fast fashion process is the ability to make decisions without delays (Caro & Martinez-de Albéniz, 2014; Sull & Turconi, 2008). Fast fashion organizations are flexible and hierarchically flat to enable fast decision-making (Bruce & Daly, 2006; Sull & Turconi, 2008).

Some stages of the product development cycle are skipped in order to achieve short lead times, such as longer product development processes and extensive

quality testing. Only available stock materials can be used, as there is no time for fabric development (Caro & Martinez-de Albéniz, 2014). Figure 7 illustrates the accelerated design and production process of a fast fashion product compared to a traditional product.

Design strategy

Much of the success of a fast fashion product is related to its resonance with the customers and right timing. At the core of fast fashion are fashionable design and the ability to track emerging trends. Design represents a value proposition that other elements, like quick response, try to deliver.

The competitive advantage of fast fashion companies has shifted from price towards fast response to changing fashion trends and consumer demand. Quick identification of these trends has become vital to fast fashion retailers. (Caro & Martinez-de-Albéniz, 2014) The fashion industry relies on the constant change of product and the ability to deliver newness.

Today’s fast fashion market incorporates both accelerated product variations and mass diffusion of catwalk fashions. One key feature in fast fashion design strategy is high fashion elements on a mass-market level. Having the desired product in stores at the peak of the demand and before competitors is essential. (Barnes & Lea-Greenwood, 2006) Cachon and Swinney (2011) state that enhanced design capabilities result in products that are of greater value to customers and elicit greater willingness to pay.

Design inspiration for fast fashion comes from customer demand and is often traced to catwalk fashion, celebrity style and popular culture (Barnes & Lea-Greenwood, 2006; Hayes & Jones 2006). Design teams gather information from a wide range of sources and identify patterns to anticipate which products could become commercially successful. Designers must be able to make fresh connections among apparently unconnected events and be able to distinguish the key variables from trivial ones. They must anticipate trends from information that is often incomplete and ambiguous. This is all done at a fast pace, in real time and under competitive and commercial pressure. (Sull & Turconi, 2008)

Sull and Turconi (2008) write about the importance of shared **situation awareness** as a success factor in fast fashion companies and especially among designers. It helps designers to anticipate fashion trends and changing consumer preferences to avoid lost sales, overstocks and markdowns of unwanted items. The authors state that in the case of Zara, an in-house design staff of over 300 designers work closely in teams with market specialists, merchandisers and buyers. Designers use a combination of customer data and market information in addition to their fashion discernment.

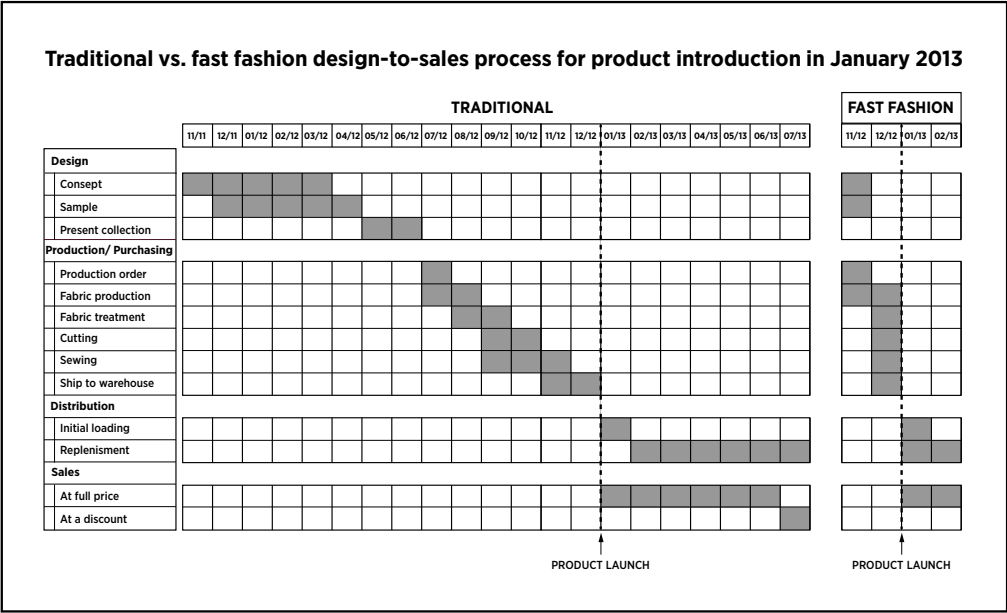


Figure 7. Traditional vs. fast fashion design-to-sales process for product introduction in January 2013. Source: Caro & Martinez-de-Albéniz (2014).

Situational awareness is built in three steps: observing raw data, making sense of raw data and testing hypotheses. In the case of Zara, raw data comprises information gathered from multiple sources. Designers gather data on sales and inventory on a daily basis. Zara also enlists their store and country managers to deliver market-specific information on sales and customer needs.

The second step is to make sense of the collected raw data to discover potential opportunities or threats. Zara has their in-house design team located in the same facility. This enables frequent face-to-face discussions among the design and commercial teams to assess the data from multiple viewpoints simultaneously and immediately. Collaboration between commercial functions and design functions is important. Commercial staff routinely weigh the design decisions based on their expertise and designers draw on their deep understanding of fashion and trends to make their viewpoint heard on the commercial decisions. Zara considers quick design decisions critical. This allows them to introduce approximately 50% of their new product during the season rather than at the beginning of any season.

The final step in building situational awareness is the testing of hypotheses. Design ideas are discussed among designers and either discarded, altered or taken forward. Rapid prototyping of design ideas allows quicker decisions based on better product understanding, in comparison to just having a garment sketch. Prototypes are hung with the rest of the collection and can be assessed by designers and commercials if they fit with the rest of the collection. Zara also emphasizes

team-working abilities and hires individuals who are able to take and give feedback and share credit with the team. (Sull & Turconi, 2008)

Sull and Turconi (2008) made a case study of Zara and their practices. Similar methods can be seen in other fast fashion companies. H&M also has an extensive in-house design staff that is divided into multidisciplinary teams consisting of commercial and design professionals. H&M has a similar low hierarchical organization that encourages free discussion. However, they are not capable of making decisions as fast as Zara does. H&M also prefers to recruit individuals who match the team-based, low-hierarchy working culture.

It is safe to assume that all major fast fashion retailers have some kind of in-house design team. It depends on the company organization what is the extent and role of the design department and design decisions. Design teams use the help of at least two external partners in their work: trend agencies and suppliers with design capabilities. Trend agencies provide design-related market intelligence and analyses from around the globe.

The emergence of suppliers with their own design teams has been a strategy that suppliers have used to their competitive advantage (Barnes & Lea-Greenwood, 2006; Tokatli, 2007). Their design teams work much in the same way observing the trends and creating samples and collections. Client companies have much more flexibility if they can directly pick from these offered samples instead of developing their own (Barnes & Lea-Greenwood, 2006). Fast fashion retailers use both their own product development and supplier

design services. When external design services are used, it is the in-house design team that guides the work and product development (Jackson, 2007).

New dynamics

Since the H&M collaboration with Karl Lagerfeld in 2004, the fast fashion market has embraced the concept of guest designer collaborations. Every year such collections come to the market globally (such as H&M) and regionally (such as Target in the US). These collections have featured unique designs and re-issues of designers’ previous popular styles (Vingan, 2013). The benefit of designer collaborations is twofold. Fast fashion retailers gain fashion credibility and media coverage and the guest designer gets exposure and availability to a new customer segment.

Topshop has been pioneering another new design-related phenomenon in the fast fashion market since 2005. It has been showing its in-house “Unique” collection at London fashion week (Chilvers, 2012). H&M followed in 2013 with a Paris fashion week show. H&M’s collection was also based on in-house design teams’ creativity and independent trends (Chilvers, 2013). Fast fashion retailers have emphasized their own in-house design capabilities and have tried to take the leap from having a reputation for being a fashion follower, to becoming a fashion leader.

Both H&M and Topshop support emerging designers in several ways. Topshop has had a “New Generation” support scheme for new UK-based emerging designers in place for over a decade. They also sponsor Fashion East, an organization that brings

forward new designers in London Fashion Week (Arcadiagroup.com). H&M hosts the annual H&M Design Award for fashion students with a main prize of 50,000 euros and a capsule collection sold at H&M stores (designaward.hm.com).

The red carpet commonly used in gala celebrity events such as the Oscars, has traditionally been reserved for high fashion designers. Celebrities walk the red carpet in bespoke gowns by designers like Valentino, Givenchy or Alexander McQueen. However, the 2015 Met Gala witnessed a strong presence from both Topshop and H&M in the form of custom designed dresses worn by high profile attendees (Sowray, 2015). An H&M dress was also worn at the Oscars in 2013. Interestingly, H&M has profiled their most exclusive designs sustainable. The fast fashion industry seems to have taken design efforts more seriously in recent years and is reconfiguring industry dynamics.

3 Data and methods

3.1 RESEARCH QUESTIONS AND OBJECTIVES

In this study I will discuss how designers in the fast fashion industry meet the expectations of their role. I will also explore the strategic elements of the designer’s role. This study will provide a new understanding of a fashion designer’s strategic role in the fast fashion value chain.

Fashion designers are at the center of my study since the existing literature of the fast fashion phenomenon is focused on supply chain management, marketing, consumer behavior, sustainability and business strategy. Forecasting customer demand and reacting to emerging trends that drive the fast fashion product offering are at the heart of a successful fast fashion strategy and these functions lay largely in the hands of designers (Barnes & Lea-Greenwood, 2006; Caro & Martinez-de Albéniz, 2014; Sull & Turconi, 2008).

My research question is as follows:

How do designers add value in the fast fashion process?

3.2 QUALITATIVE STUDY: SEMI-STRUCTURED INTERVIEWS

Interviews provide an in-depth way to hear designers’ own interpretations, experiences and thoughts about their roles and values in this space. Interviews are one of the most common methods for conducting qualitative research (Ruusuvuori, Nikander & Hyvärinen 2010; Silverman, 2006).

Data for this study consists of five (5) semi-structured interviews with professional designers. Interviews were conducted between 24th April and 19th May 2015 and recorded for transcribing. Two of the interviews were done using Skype since interviewees were in London and Barcelona. Three were conducted personally in interviewees’ homes in Helsinki and Stockholm to achieve a relaxed and calm atmosphere for discussion. Interviews lasted from 30 minutes to 1 hour, 15 minutes.

3.3 INTERVIEWEES

I recruited the interviewees from my network of acquaintances and former colleagues. My criteria for participants were a minimum of five years’ experience in the industry, a formal design education and an employer that operates in the fast fashion industry.

Two (2) of my participants represent a global company located in Scandinavia that operates in the fast fashion industry,

one (1) is from a local Finnish company that has fast fashion purchasing operations, one (1) is from a fast fashion supplier located in southern Spain serving Spanish and other European fast fashion companies and one (1) is a London-based trend specialist who works with fast fashion companies as her clients. They are all female and in their thirties to late thirties. They all have a formal fashion design education at Bachelor’s level from European design colleges. They are experienced designers and have professional experience ranging from 10 to 15 years in the industry.

Below is a brief description of each participant and an abbreviation to which she will be referred in this study

EJ has 12 years’ experience with the same employer in various design positions from junior to senior level. She also has experience as a design recruiter. She has worked for a global Scandinavian fast fashion retailer. Interview conducted in English.

DA has a ten-year career in the fashion industry. She has worked for several employers in design positions and currently is a senior-level designer in a global Scandinavian fast fashion retailer. Interview conducted in Finnish.

KP has been working in the industry over 15 years as a designer. Most of her designer experience is from a Finnish fashion retailer with regional international operations. She has been responsible for fast fashion products. Interview conducted in Finnish.

HT has been working for over 12 years as a designer in a fast fashion supplier

company. She is located in the south of Spain. Her clients include major global companies in the fast fashion sector in Europe and Spain. Interview conducted in Finnish.

BW is a trend specialist with 11 years’ experience in designer positions and 4 years’ experience in trend forecasting. She currently runs her own trend consultancy but she has experience from a global trend agency. She has worked with clients in the fast fashion sector as a trend consultant. Interview conducted in English.

It was important that the interviewees were experienced in their profession so that they could reflect the industry and their own role and actions in a wider context and timeframe. This is also a more homogenous group to analyze since all the answers come from similar levels of experience. Having, for example, junior designers in the data could provide new kinds of answers but with a limited number of interviews it could result in inconclusive findings.

I also decided to concentrate on European companies even though there are a number of significant companies in the US and Asia that operate in the fast fashion industry. European companies have a comparatively uniform working culture and legislation is more similar even if differences exist, thus making results more comparable.

Some of the interviewees did not mind being mentioned by name but a couple wished to stay anonymous. I offered the possibility to be anonymous since talking about work can include industry-sensitive

material and I wanted interviewees to be able to speak freely without being concerned that their comments could be published and tracked back to them. I decided to treat all my interviewees anonymously and edit the industry-sensitive material in the published data and citations.

3.4 INTERVIEW THEMES

The interview revolved around 5 themes that were discussed based on my preliminary questions.

Themes covered were:

The fast fashion phenomenon and industry

Role and responsibilities of a designer

Motivation and success factors

Working with sources of inspiration and trends

Creativity in the fast fashion industry

Interviews followed the participant’s trail of thought with additional questions and clarifications. The actual questions asked in each interview were not exactly same but covered the same topics in all interviews except with BW. The interview with her was limited to 30 minutes and her role is different from other interviewees, as she is not working actively as a designer. Her interview served as background information and another viewpoint on the topic.

Before conducting the actual interviews I did three test interviews. The focus for these rehearsal rounds were to test my interview structure and technique as well as recording equipment. This phase led to some refining of the questions for the actual interviews.

3.5 ORGANIZING AND TRANSCRIBING THE DATA

All interviews were audio recorded and later transcribed. In the transcribing process I left out pauses, mumbling and repeated words with no substantive content, and other non-substantive content like comments about coffee, toilet breaks or technical issues with Skype. This level of preciseness in transcribing is justified when the objective is to gather content, not for interaction or communication (Ruusuvuori et al., 2010). Transcribing was also a good way for me to get even more acquainted with the data. This is also recommended by Ruusuvuori et al. (2010) in their book for analyzing interview data. I noticed things that I did not pay so much attention to while conducting the interview.

I transcribed the interviews in the language they were conducted. In the end the data was handled in English, so some translations had to made in the analyzing phase. This posed some issues since it was slightly more complicated to find corresponding words and concepts in translations than it would have been if all were in the same language. However this did not compromise the credibility of the data and analysis because all the interviewees represent the same professional culture. So it was still easy to classify important

parts from the data. I have also worked in the same field in both languages so my professional vocabulary and language skills are adequate to process this information fluently. Besides, the analysis of language or interaction is not in the scope of this thesis. The focus is on the content of the interviews.

3.6 ANALYZING AND INTREPRETING DATA

After transcribing the audio recordings I proceeded with classification of the data. The objective of classification is to systematically go through the data from the point of view of research question and central definitions and theories (Ruusuvuori et al 2010).

While processing the data I started to question my initial research question. The data was starting to show more interesting and significant themes that pointed me to adjust my research question and framing. Ruusuvuori et al. (2010) write that framing has to be justified and consistent so I framed my data with the refined research question.

I used the principles of grounded theory as Jari Luomanen presented in Ruusuvuori et al. (2010) to analyze my data. I felt this was a good approach since my topic is not researched widely (Ruusuvuori et al. 2010). I followed the principles of grounded theory analysis but applied it to my research questions and data as suggested appropriate in Ruusuvuori et al. (2010).

My aim was to create an interpretation and a model based on the analysis of the data. Similarly as with qualitative research

in general, in grounded theory-based analysis the researcher, while coding and classifying the data, compares the instanced and observations from the data and makes suggestions of the relationships between them (Ruusuvuori et al 2010).

While reading and transcribing the data I formed an initial interpretation of my findings. I classified my data according to this into two main categories and then proceeded to form concepts inside them. I proceeded to further group the concepts inside the categories. I made a framework of the categories and mapped the parts where they were linked. In the final part of the grounded theory analysis the findings are systematically linked together to form a conceptualization or a theory as described in the literature (Ruusuvuori et al 2010; Silverman, 2006).

3.7 VALIDITY AND RELIABILITY

The validity and reliability of qualitative research is often judged based on the criteria for systematic analyzing and reliability of interpretations. This is achieved by opening the process and choices made as well as describing the data which is the basis for the conclusions. As important as describing the data that supports the conclusions is to present possible limitations (Ruusuvuori et al., 2010).

One limitation to this study and the generalizability of the findings is the small number of interviewees and companies that they represent in an industry that is global. However, the data suggests saturation so no more interviews were needed for this level of study. On the other hand, in a subject that is studied very rarely this

is sufficient to open the discussion and provide new openings for research. Some generalizations can be made, but these should be tested in future research with wider sampling. Future research on the topic of this thesis is suggested in the final chapter.

Another limitation is that the interviewed designers except for KH do not work exclusively with fast fashion. They, however, see themselves working in the fast fashion industry via the companies they work for and the creative and business environment of which they are part of. In light of that, the findings can be generalized to apply to a wider sector of commercial fashion industry including fast fashion practices inside it.

Adding to the reliability of the findings is the fact that the interviewees are of similar experience level and positions. Furthermore, the saturation of data suggests that there is a sufficient amount of data to answer my research question.

The systematic analyzing process makes my interpretations reliable in the context of this study. This study is a good first step in this seldom researched field.



4 Value added by designer

In this chapter I present the findings of my study. The citations to the interviews are translated if not conducted in English. The abbreviation mentioned earlier is used to indicate whose citation is used. The citations are selected for their clarity in indicating the finding.

4.1 STRATEGIC VALUE

The first part of the findings focuses on the intangible value created by designers. Changes in the fashion environment have elevated the role of designer. With this change the process has become driven by the design and trends and how successfully this is translated to fulfilling customer needs. The designer can be seen as a strategic gatekeeper between the trends and the end product, using brand, strategy and custome as frame. This is a strategic role and the interviewees experience it as a key responsibility in the designer profession.

Changes in the fashion environment

Many of the changes in the industry and in the designer's role are credited to the customer. Designers talked a lot about the customer in the role of customer and consumer. They saw consumers as a wider mass that includes also people that are not considered directly as target group for their brand.

“It started with the consumer. Earlier, people accepted that certain things took time and people didn't know about them. The ivory towers don't exist anymore, you know, that you see the Paris shows and then something trickles down slowly to some shops. There are the online shops, blogs, people travel so much, it's everyday for them.” KP

Consumers drive bigger changes in the industry and values in consumer culture. They do not affect designers' everyday decisions but are seen as an important driving force in the development of the industry and practices.

When designers speak about customers, then they talk about those people that are their target audience; the people their

designs are intended to be worn by. All information is reflected via the customer. They are actively present in their everyday work both at the strategic level as well as practical. The customers and consumers have demands for the fashion industry and the power of these demands has grown. Both the designers in this study and literature (Barnes & Lea-Greenwood, 2006) see the fast fashion phenomenon as a consumer-driven process.

“It's a reaction to the fact that people are getting much more aware and getting so much more updated. They dare to... Fashion is also getting a little bit more open to translation. It's not like dictated.” EJ

The designers refer to the “old days” when trend information and catwalk reports were only accessible to professionals. Digital innovations have democratized the information on trends and catwalk shows and now they are accessible to everyone the minute they are published. The barriers of time and distance do not matter to the digital consumer. If their local high street cannot provide the things they see they will get them online.

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The designer can be seen as a strategic gatekeeper between the trends and the end product, using brand, strategy and customer as frame.

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Working with trends and sources of inspiration has become strategic since the ideas designers present have to reflect the company’s vision and strategy. The value of design is not seen only in the traditional design of the garment.

In recent years new popular social media innovations, especially in the field of image sharing, have become more influential in distributing trend information.

“People are getting much more aware of fashion and what is the latest thing. So that’s what they want. It has to grow in share [of what is offered to them].” KP

The demand from consumers for new things puts designers in the position to adopt even more responsibility in order to satisfy their customer. Designers are still referring to blogs and online shops, but increasingly to services like Instagram, Pinterest and Tumblr. They are all image-sharing social applications born in recent years. Designers must be able to adopt these new technologies and sources of information and inspiration fast. Nixon & Blakley (2012) also note that fashion industry professionals are credited for adapting and capitalizing on new innovations.

“When I started no one had Instagram. Now everybody has it. You have to know who to follow in Instagram, who’s trendy. It influences more and more, social media, blogs, Tumblr... and Pinterest as well.” DA

“Well, you follow these certain people in Instagram, their style, or in Pinterest. These services are important tools for us.” HT

The role of information management

Fashion is moving towards more unpredictable trends and faster changes in consumer behavior. The role and responsibility of a designer has become more important.

Designers in my study point out that it is crucial for them to identify and respond to changing styles. They strongly identify this feature as their main responsibility. Barnes and Lea-Greenwood (2006) write that fast

fashion is information-driven. Designers gather, manage and filter the information that is relevant to their customer offering in terms of current collections under design as well as future needs not yet specified.

“I always saw it that way that my professional skill is this aspect of information management: that you are able to pick the right things and translate them to commercial success stories.” KP

This includes keeping up with trend developments and market developments in relation to their customers. Long-term and short-term observations are both important and linked. Their role also includes tracing societal changes at large. This helps to anticipate bigger changes in consumer behavior.

“For a company that wants to stay ahead... it’s the right direction to have a person whose job description is to do this background research and observations and be aware of it all. Through that the role of designer has become more important.” KP

Drivers in the overall change of the role of the designer in companies are the accelerating trend cycle and the new customer-driven sources of inspiration. Interviewees implied that these changes have made the designer role more valued and important in organizations since designers bring in this data and process it to a usable form for others.

“If it wasn’t for the designers there wouldn’t be the new things coming. At least I think so. It would be much more safe and cautious.” DA

Fast fashion is difficult to predict based on last year’s sales. Working with trends

and sources of inspiration has become strategic since the ideas designers present have to reflect the company’s vision and strategy. Designers also have to know their target customer in and out to be able to decide what to bring forward, what to postpone and what to pass on. The demand for newness from customers has shifted the focus to more trend-driven processes in purchasing strategy.

This is one of the key findings of this study. The value of design is not seen only in the traditional design of the garment. The role of managing information is more emphasized by the interviewees than the product design. They see it as the number one focus of their role. This is the foundation for successful product decisions.

“With fast fashion, you need to be more aware of the trends, the designer collections, of everything that’s going on. To be able to make decisions with less definite information.” KP

Gathering information is an ongoing process for the designers. It is linked to a much wider timespan than just the quick trends. However, this was more apparent in the answers of designers with responsibility for seasonal collections as a whole. They emphasized the relationship between the quickly emerging trends and the wider background research needed in their work.

“I think it’s important to have the whole picture because that’s also the way to connect these elements you see. You need to have a broader perspective to be able to make these connections and come up with new ideas.” EJ

To be able to connect the information from various sources requires practice and experience but also talent, motivation and intuition. With experience over several seasons and trend cycles, designers are able to place the trends to a more relevant context in regards to their customer.

“I’m coming back to the importance of the background research. All the ideas you collect, they are meant for a longer time period. From that you can pick things and connect when you see something emerging. You see it happening here and there and then you connect it to the research.” KP

The designers are also able to anticipate the changes in the trends and how they will evolve. Identifying the commercial potential of a trend is important as well. All the decisions are made with the thought of generating sales.

“It’s part of the background research. That you have been researching the trends for years and you have seen the cycle” KP

“Because designers are working year after year they kind of have a natural trend tracking ability where they see how the trend is evolving. And they are able to also pick up on it. If you’ve worked enough years in the industry you’re able to pick up on the “I remember this trend ten years ago, it’s coming back now...” BW

“With a new tendency, it’s important to see the growth potential, for example that you can make variations.” DA

The background research can include non-visual research. EJ speaks about the more broad analysis of the surrounding

society and values that she refers to with a Swedish word “*omvärldsanalys*”.

“And the social, the “omvärldsanalys” [analysis of the surrounding world]. Because then you can see where something is going and then you won’t be surprised all the time. It’s quite a logical pattern actually.” EJ

Part of the knowledge base designers utilize is fashion and style history. This is a common practice throughout the fashion industry from the high-end to the high street and is still as relevant as ever. Much of the trends are referenced to iconic fashion eras, such as the 50s or lately the 90s.

“But some trends are much longer, they have really long legs. For example, the fifties trend, that’s a massive impact in terms of shape but also color. So even though the pencil skirt is not as trendy but now you’re still seeing a lot of those fifties pastels coming through. They’re just reinterpreted.” BW

To understand these references and to be able to flexibly utilize and modernize them designers feel it is important to know these fashion eras and key designers who influenced the visual output of those times. Trends utilizing fashion history often are linked to a longer seasonality and can make appearances in different forms.

“I think fashion history is very interesting and important. You have to be aware of it. Like now with the 70s and the hippy influences. You need to be aware of what elements of it are easy and desirable right now.” KP

“I think you have to know all the fashion decades, from about the 50s onwards. For our young customers. For them the 90s is a new thing, they haven’t seen it before.” DA

These elements from fashion history are yet again filtered and edited to match the brand and customer expectations. It is noteworthy that this knowledge of fashion history and the ability to interpret it are part of the designer education in many design schools.

Intuition and experience

Intuition and experience are tools that help designers to see the relevance in the information. These are tools that cannot be bought but are instead innate and achieved with time. Intuition is hard to measure and can be understood as a classic fashion designer trait. However fluffy the using of intuition can sound it is used naturally by designers to guide their decisions. Designers describe that certain things just feel right.

“Sometimes it’s just the gut feeling. That can mean a lot too. Okay, this feels really good and important to show even if it has not been showing so much.” DA

To be able to trust their intuition or gut feeling, designers reflect and train their intuition based on the commercial success of it. They develop a sense of commercial potential and it is used as an internal filtering process for ideas.

“It’s the designer that [who] is making the choices there, always. What do I follow or what do I choose and what do I pick up. All these, part of it is based on the intuition”. KP

Experience of successful and unsuccessful intuition-led decisions guides the future thought process. The increasing success level of intuition-based decisions can be

suggested as a measure for rating individual designers’ ability.

“It depends on how commercial I feel it is. My background is affecting this of course, that you are aware that certain things are easier to transform into a commercial form than others.” KP

“You have to trust your gut feeling. It comes with the experience. Over the years you believe in things and you push them. We should do this or that. And then they sell well. And next time you are more confident that I got that, it was great, we were just on time with it, I sure am glad I pushed the idea, say a silver color, even if it was a bit difficult.” DA

Young designers entering the industry have a lot of ideas and they respond to trends quickly. What they lack is the history of the commercial implications of their intuition. In a design organization it is profitable to have designers of all levels present to harness the potential of experience based judgment and fresh thinking. DA gives a good example on the meaning of experience in training intuition.

“So it comes with the experience. When I started I had so much ideas but I had no idea what to believe in. I had no history with my gut feeling and how right it was or not. It was difficult, but you get better at it.” DA

Intuition is directed through the brand and customer framework. Through this it is linked to having a vision. Vision is a powerful tool in projecting the brand into the future and the work towards that vision.

“The designer is the one who has to have the vision, the one who makes the choice.” KP

Importance of timing

Timing ideas correctly is very important for the end result. The designer has to judge the trend potential in relation to the adoption potential of their customer. Is some trend at a too early stage for the target audience? What is the volume of the trend and how big of an impact should it make? Is it just a risky test of a new idea or a full-on commercial success story to be capitalized?

“You have to know the customer. Some things can be too early. No one is expecting to find that is the my brand’s stores” HT

“For example, festivals are important to me. There are lots of people with different styles. You can find new things there; people make an effort to dress while going there. You can find something new that the masses have not adapted just yet. But you can pick it from there and then it’s viable in one year.” DA

“Some other things can be a bit more difficult to push. With trends like that I might think that it’s good to look out for it a bit longer. See what happens with it, is there any more signals, and then act on it.” KP

Timing is not only related to trend adoption but also seasonality. Fashion is global but some companies still operate in more definite geographical locations and have to judge the emerging trends based on their circumstances.

It is not enough that the designer has all these pieces in place and is ready to design the products. She has to communicate and convince other stakeholders, like buyers and managers in the production process, to believe in the product decisions. Communication skills, the ability to make decisions and business understanding are as important traits as intuition and creativity.

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The designer has to judge the trend potential in relation to the adoption potential of their customer. Is some trend at a too early stage for the target audience? What is the volume of the trend and how big of an impact should it make?

4.2 IMPLEMENTATION VALUE

The second part of the findings is based on the tangible value created by designers. This is the more visible and traditional part of a designer’s work. It is creative problem-solving for the product. It combines the intangible capital of trends, customer information and practical design work within the framework of the company and industry. Adding value is in the choices designers make for the product. These choices include the trend implemented, the fit and overall feeling of the garment, materials and silhouette. This is implementing strategy to make products that represent the value proposition of the company. Even if the designers in my study emphasize the importance of the gatekeeping role, the executing role is equally important in turning ideas into actual products. In other words, professional designers have a dual role.

It can be thought that the first skills to develop are the ones needed for the role of executor. This is what is taught in the designer education system. As designers enter work life they usually start as assistant or junior designers on products with guidance from more senior designers. It takes time to gain a comprehensive understanding of materials, production and commercial side, which are important in building the ability to think strategically. The importance of experience was discussed in the first part of the findings but is apparent in the executor role as well.

Working inside a framework

Designing in the fast fashion environment is not free from constraints. There are various limitations that set a framework

in which the designers conduct their work. These limitations include the company and the brand for which they design, and what is appropriate for the customer and the brand. This was also evident in the first part of the findings but in this role it is much more concrete in terms of actual product development. Price and production schedule also set limits as they influence what materials the designers can use on the basis of price and availability. Fast fashion products have very short lead times and often materials must be ready in suppliers’ warehouses and be within the price range of the target price set. The same goes for details and accessories. This material part is elevated in the executor role.

“It’s quite a small box. So you have a lot of limitations. And with all these things you have to solve the problem of the product. How is this product going to be? So you have to solve it.” EJ

“That’s where you need the creativity when you see something but you have to make it into something new and to your target customer. And in the framework you have, like price, materials, all this. What is possible and what is cool to do within the limitations. It’s [a] different kind of creativity.” HT

Designers link creativity with problem solving and in the aspect of striving to do nice and cool products with the limitations. EJ states that it demands a lot of design skills when you are balancing the design inside this framework. Designers also have to consider how the trend or inspiration is adapted. HT talks about “softening” or mainstreaming the original ideas that might come from major RTW shows or from fashion forward

blogs. The target audience is still mainstream even if they want the latest trends. The ideas have to be made into a commercial form without losing the core of the trend.

“It’s problem solving. How are you going to get the thing into the design in [a] way that it doesn’t go too extreme. That people are willing to pay for it and you can see it hanging in the shop.” KH

Design process

When talking about the design process the interviewees brought up a few different approaches. They talked about the accelerated pace of the design process, its direct connection to the information that they have gathered, and the use of external suppliers with designers of their own.

The design process of a fast fashion product is accelerated too. This is often the case in all design processes in fast fashion companies even if the order isn’t quick.

EJ and BW note that there is not as much time or possibility to experiment in the fast fashion environment with such tight time constraints in the design process. Some parts are skipped and the process goes directly from idea to product.

In companies that do not operate on such a tight seasonal schedule and who even develop their own materials, the designers have time to experiment hands-on on silhouettes, details and such. This part is skipped in the industrial fast fashion design process.

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It combines the intangible capital of trends, customer information and practical design work within the framework of the company and industry. Adding value is in the choices designers make for the product.

“It’s not so much experimenting. That’s I think what is the difference. You can be creative with a lot of experiments. And there is no place or time for that. We must be also smart. Skip some parts of the design process. You do have a design process but you skip like a big part of it.” EJ

BW, who is a trend consultant working with independent designers as well as fast fashion clients, is concerned about the overall effect of the tightening design schedules. She sees that the tight schedules are affecting the creativity of the whole industry from high end designers and trickling down to other segments of the industry.

“I think it’s taking a lot of the creativity out of the work. Because they don’t have time to really be as creative [in the high-end industry].” BW

The time to design products varies from hours to a few days, in the experience of the interviewees. Much of this had to do with the company decision-making structure and its organization. HT, who is working as a designer for a supplier with its own manufacturing and on-site sampling, was at one extreme of the design schedule. She was able to have a prototype out in a day. This is also the case with her main client company, Zara, and their quick decision process, as stated by Sull & Turconi (2007). They have adjusted their design cycle to match their clients.

“When I’m really sure about something, then it doesn’t take more than one day to make the prototype. I make the sketch, the garment technician makes the pattern. We know each other really well. Then if we have the materi-

al, it is cut and sewn with us during the same day. Of course if there are prints or something then it might take one more day.” HT

She also does not design collections, but products or small product families that are then presented and picked and adjusted by her client company’s designer to match their collection.

For others, like KP and EJ, the time to design the products extends to some days. The sketches are then sent out to be sampled externally elsewhere by the supplier. When the product is sampled it is sent back for commenting and approval. This lengthens the lead times and can reach a minimum of eight to twelve weeks’ delivery time.

“Then it gets tight, when you actually start to design the products. Then you have to wish that you’ve got your library in order at the back when you’ve got two days to design it, one day to send it and maximum one week to comment when the samples arrive.” KP

KP notes the importance of being mentally prepared when the design schedule is so tight. It is important that designers are aware of the overall picture and can justify their decisions and choices on product development. Designers also design and manage the main collection to which the fast fashion design is incorporated into. They have to take into account the design development of the main collection as well, while HT only works with up to date product ideas that are suitable for the overall design and customer strategy of her client companies.

Companies use both their own designers and supplier designers for fast fashion

products. When companies use supplier samples it is still the in-house designers who select and communicate the possible changes to the styles. It saves time if they are able to find design that fits their needs from suppliers like the one HT is working for. There is usually always a designer involved in the process of creating or selecting new styles.

“We did some of these orders. And usually, we didn’t even design it ourselves. We just bought from suppliers.... And even if you are [a] company that is buying the collections, if you don’t have any designers, you’re buying the collections from a supplier directly. Then it is the suppliers’ designers who are doing it for you. So there is always designers involved. Yeah, you must have that.” EJ

Design for a fast fashion process is accelerated, as is the whole cycle for fast fashion. Designers design and plan the products themselves and additionally use supplier samples designed by their designers. Supplier samples are based on close collaboration between companies, as explained by Barnes & Lea-Greenwood (2006) and Tokatli (2007).

The value of a designer comes from their ability to manage and execute urgent tasks while retaining the overall picture. A designer must be able to make decisions quickly in all areas of product development.

From a trend to a product

Adapting a source of inspiration is a practical matter for the interviewees. When you have worked several years, have a background in product design and seen how trends translate to products you

are able to recognize the relevant core elements of the trend and adapt it to a product that communicates same fashion meaning.

“It’s the core from the inspiration that adapts to the product.” DA

“When you start to work with the collection or a product, then you just put the elements there.” KP

“Inspiration is always about getting some elements and getting them into your own concept or your own frame... It’s the colors, prints, so it’s a lot of different elements that you can take and then translate and think about your own customer.” EJ

In adapting a source of information, designers use their understanding of the customer, brand and company strategy. It is an intangible frame for their design and creative process.

DA and KP follow up on finding the core elements of a trend and they give some examples of the adaptation possibilities.

“Like the etno trend or the bohemian trend. It could be a material, like suede. Or the thing that makes it bohemian are fringes. Details like these, materials and prints that can be part of the product. Or it can be color, like cognac brown. Then it makes the etno bag for example.” DA

“For example this A-line skirt. Then it’s just that. It can be shorter or longer and almost any material. Some materials are trendier than others and if you put buttons in the front then it’s even more fashionable. You can make variations.” KP

If the inspiration is a more abstract trend like the 70s or etno there is much possible variation in how to adapt the trend into products. It could be a silhouette, a color, print, material or a combination of some or all of these. As mentioned earlier, interviewees referred to not going too extreme on the design ideas on the cost of commercial potential.

“For example, I can’t imagine that my customer would buy a maxi length tunic with high side slits. I have to make a version that is knee length and so forth... modify it, so it’s not so extreme and over the top.” HT

When the inspiration is more detail-based or centered around one product type, like a high slit or a bucket hat, designers try to find possibilities to increase the commercial potential of the idea by seeking variation inside that frame. To be able to vary the idea into different product types or materials a wide knowledge base is required, both technically and commercially.

“It’s good to see the growth potential. That we can see variations of it, different materials, sizes, but the thing is the same. It can still be a bucket hat if it’s, say, a little bit bigger, or it can be girly if it’s a certain color, or sporty if it’s like black PU.” DA

“It depends on the trend, what it is. Like these slits, you can put them to so many different kinds of products, but they are best in the certain ones.” KP

Some companies use the term “value driver” when pinpointing the element or set of elements that are the most important for the customer in making the purchase. For fashion products intended for the early majority it cannot be too many elements.

Often just a few communicate the fashion value and make the product desirable, like a suede material and A-line silhouette. The more visible the value driver – like a print or an effect material – the more toned down the other elements are. As the result, the product is still within the adopter categories limits. Adapting a source of inspiration to create a fast fashion product includes on a tangible and intangible level all the actions and decisions designers take.

4.3 ADDING FINANCIAL VALUE

Companies in a competitive market environment generally want to make profit and see growth in their business. Carr and Pomeroy (1992) write that there is nothing more certain in the clothing business than the fact that sales revenue minus costs equals profits. A business must have a certain level of revenue in sales to cover the costs and generate profit (Carr & Pomeroy, 1994). In the end, all actions have the goal of adding countable value in profit. Designers have an important part in this. Designers working in the industry are able to understand the financial realities and see how their position is related to this.

Fast fashion is often part of a company’s wider portfolio. Fast fashion products are important in attracting customers and building a fashionable brand image, but they can also have a strategic role in testing the commercial viability of a trend. As discussed earlier, timing the fast fashion product right in terms of fashion adoption is important. Still fast fashion products are targeted to more fashion-conscious customers than products with greater volumes targeted at more of a mass audience. Fast fashion products can serve as a valuable

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Design is a cost to a company, but design can generate increased profits. Customers are willing to pay more for garments they consider to be more fashionable and innovative.

test of whether an idea will garner interest among a wider audience. An idea can trickle down inside the company’s portfolio to a more mainstream collection if the public shows an appetite for it.

“We made a really successful trial with the festival campaign. It was a 90s choker. It sold really well. We were like ‘yeah! Score!’ We can make millions of variations of this. It can be leather or velvet, it can be romantic or a pack, whatever.” DA

Design is a cost to a company, but design can generate increased profits. Customers are willing to pay more for garments they consider to be more fashionable and innovative (Carr & Pomeroy, 1992). Design also reflects positively to the brand, as design is one of the key identifiers for a brand (Borja De Mozota, 2003).

Cost Breakdown: adding mark-up

When discussing the price of a garment it is important to distinguish the retail price from the manufacturing price. This dif-

ference between the manufacturing price and retail price is usually referred to as mark-up. (Carr & Pomeroy, 1992)

Regardless of the retail pricing strategy of the company, the manufacturing price is less volatile because it is composed of costs related to all garments, like labor costs, material and trims, and labeling. Costing is often perceived through cost breakdown analysis (CBD). Production volumes, and labor costs (CM, cost of making) are costs companies are able to effect by making shrewd sourcing decisions. Higher production volumes decrease CM and material costs per item, and choosing a low wage production country over more developed countries decreases the labor costs that are part of the CM calculation. These decisions however are not in the domain of the designer.

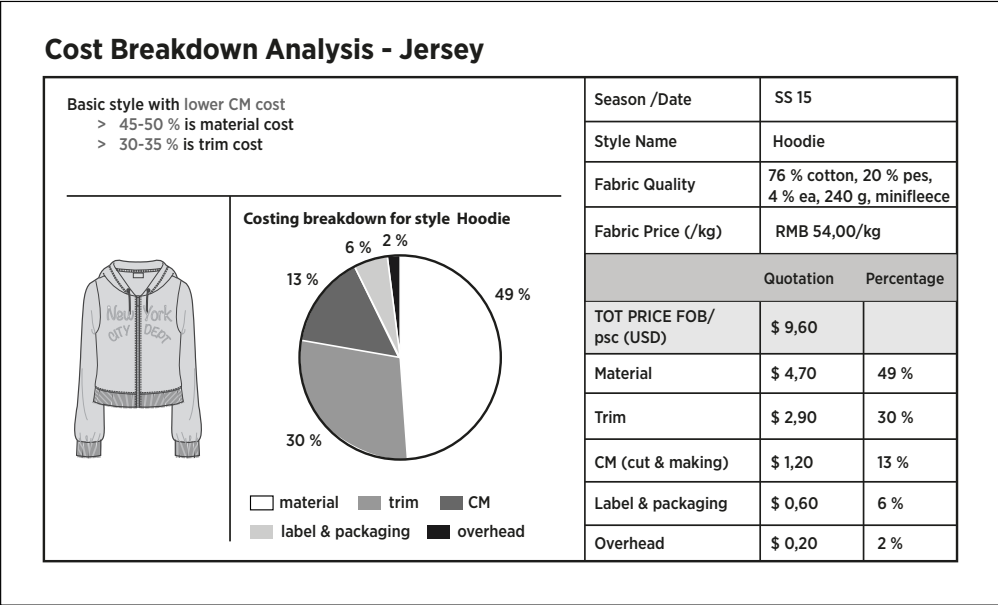
Design has the greatest impact on the materials part of the CBD. The choice of materials and trims as well as design details like fit and construction have a direct affect on the cost structure and end manufacturer price (Carr & Pomeroy,

1992). By focusing on the value driver of the product – whether it is fabric quality, print in a specific technique, or a new fit – and making smart choices in the other elements, designers can increase the potential mark-up of the product and create value in hard cash.

This requires extensive knowledge about the business, sourcing and production. Designers must make a design that is valued by the customer in a cost-efficient way. Balancing this is a question that designers must tackle with each and every product they design.

Figures 8 and 9 show an example from industry of the cost breakdown analysis of a hooded sweater with embellished front decoration. This may not be a fast fashion product but it is sufficient to illustrate the effect that smart decisions in selecting trimmings (zippers and threads in this case) can have on the overall manufacturing purchase price. Figure 8 shows a standard version of the hooded sweater with a price of 9.60 USD. In figure 9 some of the branded accessories like YKK (a well-known zipper manufacturer with a price premium on their zippers) are switched to a local brand within the quality require-

Figure 8. Mock-up for a cost breakdown analysis of a basic hooded sweater. Source: Adapted from an undisclosed industry source (2015).





5 Designer profile

The fashion industry as a whole, even if limited to just to design of garments, is very broad. Designers can be self-employed working with their own brand on their own terms or for example become specialists in functionality in professional clothing or performance sports. They can design for a high-end or mid-market brand or be employed at a global retailer operating in a fast fashion environment. All areas of the fashion design industry require sensibility to trends, creativity and design skills and these are the foundations of a fashion design education.

As Sull and Turconi (2007) state, fast fashion retailers like Zara tend to recruit people that fit in a certain operational and design culture, and who are able to work in teams and make decisions. My interviewees confirmed this observation. In the following section I review the designer profile required to work in a fast fashion environment.

Other qualities identified by the interviewees are the ability to be interested and understand the business side, good communication skills and versatility in general. Fast fashion companies are working environments where designers learn to present and defend their ideas. Designers must be able to communicate the benefits of their ideas.

“You must be interested in the business part. And so much comes to it. The communication with other people, all this. You have to be a designer who is quite broad, who likes a lot of things. To be able to have a good time.” EJ

KP talks about motivation, among other important traits. Motivation and versatility are connected in a way since it is often the versatility that many designers find motivating. Often designers who find their career in the fast fashion environ-

ment are interested in trends and state that they love the changing nature of fashion.

“It’s all about the motivation. A person who will manage well is motivated in a right way in this. If you want to really express your own vision then you might not be so good in this commercial sector. To be honest the ones who succeed are really versatile. You have be able to connect different things and process a lot of information. And have a sense of beauty. I could go on about these things that are needed but to me the most important are motivation and versatility.” KP

Continuing on the topic of what has motivated her in her career, KP notes it’s the ability to predict trends and shifts in consumer behavior. This element is also regarded as a creative part of the work and connected to the gatekeeping role.

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Fast fashion designers are versatile and creative designers tapping into the pulse of the trends and consumers in complicated and fast-moving working environments.

“I always thought that what drives me in this in the ability to predict. Predict changes in people’s behavior. Yes, fashion is wonderful and beautiful and it has a lot of aesthetic values, but when I really thought about it the fact is that I get satisfaction that I have been able to pick and interpret people’s consumer behavior from all this information and have been able to offer new things to them they want. That’s what motivates me.” KP

Sensitivity to trends and intuition are essential abilities in the fashion design profession even with all the tools and help from trend forecasting agencies. The intuition or the gut feeling discussed earlier is something the designers use to make decisions and choices. They have to be able to stand behind them.

The work is fast and things change around the designer constantly and deadlines must be met. HT says that it is as important to be organized and handle all the elements.

“You’ve got used to [the fact] that everything changes all the time. But still you have to be organized, that you can handle and synchro- nize it all. You have to be able to handle mul- tiple tasks at the same time...You have to keep your papers in order so to speak. It’s such a hullabaloo. Many think that we just sit and draw.” HT

Fast fashion designers are versatile and creative designers tapping into the pulse of the trends and consumers in compli- cated and fast-moving working environ- ments. They are communicative and able to work in teams and business environ- ments with strict deadlines. They practice strategic thinking and conduct actual product development simultaneously. They must be able to trust their sense of trends and make decisions based on this and make others believe in this as well.



6 Future of fast fashion

The future of fast fashion is linked strongly to sustainability issues and the values of future consumers. Two contradicting themes arose in discussions concerning the fast fashion phenomenon and its future. Most saw that the developments that have contributed to the increasing share of the fast fashion in the fashion industry are customer driven and that the industry is still growing. It was suggested that the growth potential of new markets and product ranges have not yet been met and new markets can still be taken by fast fashion companies for years to come.

“They will continue what they are doing but just in new markets. There is still a lot of years they can do that.” EJ

“They must become like a supermarket or like a department store for the customer. For every customer, they can find all kinds of different products. If they are happy with the markets they will find more and more products they can compete with. That can also

be like different brands, so they find a new customer.” EJ

The second theme was the saturation of the fast fashion phenomenon. Designers DA, KP and HT anticipated that people would get fed up with the pace of the industry and the throwaway nature it is often described to promote. This scenario has also been brought up by Sull and Turconi (2008), Caro and Martinez-de-Albéniz (2014) and by the slow fashion movement researchers (Fletcher, 2013; Pookulangara & Shepard, 2013). In this scenario rising awareness of the effects of the consumption habits in consumers will reach a critical mass. More well-made and durable products will emerge. These themes have been present in the socio-cultural trend reports for some time now.

“I hope and think that in the future... people are more interested in sustainable and ethical values.” HT

“The challenge will be that people will get fed up with all the trends changing so randomly. It’s a race you can’t win. I think you can already see something like that happening. They will become more aware of their choices and understand the results of over-consumption. They will start buying more long lasting products and then they can’t be attached to the extreme fashion trends. That’s the challenge.” KP

DA referred to a trend seminar by Li Edelkoort she had attended that had addressed these themes. According to DA, she spoke of people being more aware and wanting long lasting things.

“She spoke about it last time too. People are becoming more aware and they don’t want

throwaway things. They will want something long lasting. Personally I think it’s good when you think ecologically. It’s a pretty big thing. And fast fashion in really contradictory in that sense. I believe it will have an impact, it will change.” DA

DA sees these changes possible even in the adolescent and young consumers who are normally considered more ignorant. However, she states that it takes time for a person to develop a taste and style and young consumers need to explore their personality to arrive to this point where they can be sure of their style and know this is something they would use for a long time.

“When I think about our customer, she is a teenager and she doesn’t have much money. She is still looking for style and she wants new things. She hasn’t developed to the point where she will pay 2000 euros for a pair of shoes and walk the next 15 years in them. Because she doesn’t know if she really wants them, because she hasn’t tried the other ones. But I do think that even in the adolescent the values are going to change. Even they don’t believe anymore that you can just keep buying millions of new things all the time.” DA

All interviewees noted a significant change as a consumer in their own purchasing behavior over the last few years. They all said they consume much less these days. This could be a side effect of the information on trends they follow in their daily work or a symptom of change since they can be seen as an innovators or early adopters of trends.

Since fast fashion is a customer driven phenomenon its future is also in the hands of the customer.

Sustainability

Issues concerning sustainability are somewhat limited in the data because they were not in the direct scope of the study. However, the interviewees referred briefly to developments in materials and company strategies they implement in their daily work. Sustainability was also linked to customer demand and feedback. All designers interviewed were concerned and interested in sustainability issues provoked by fast fashion on a personal level and felt fast fashion often contradicted with their own values. They mostly talked about the sustainable materials they are able to choose and promote in their design.

“People’s buying behavior affects companies. Our firm has to reflect that as well. Ecological cotton and water based PU, you know, because there is a demand for it. We have to use at least a certain amount of sustainable materials in a season. I really try to push that we use as ecological materials as we can.” DA

Generally they didn’t see an end to the volumes and expansion of fast fashion businesses, but they also acknowledged the push from the customer side to keep up with the developments in sustainability. This was seen as a positive force.

KP pointed out the possibilities that could arise in the innovative use of fast fashion production system for new business models in the fashion industry. The near produced limited quantities typical for fast fashion have sustainable attributes, but this has not been considered as sustainable development widely. She saw interesting opportunities for new business

ideas that could use these elements from the fast fashion industry for new type of sustainable fashion business.

“Local production, it has to do with fast fashion. Smaller volumes and quick deliveries and such. It hasn’t been thought in an ecological way before.... it could be a chance for new companies to take this fast fashion idea into fresh consideration. Even smaller companies, it doesn’t have to be mainstream. It is a big chance to combine the ability to respond quickly with the ecological values and local production.” KP

EJ discussed the developments that are happening in global production integration systems in buying and production. She used the term “glocal”, meaning a combination of global and local. A global order is divided into production patches that are sent to factories around the world. The same dress could be produced in Mexico for the US market, China for the Asian market and India for Europe. This provides faster delivery times, positive environmental effects because of shorter distances, and of course advantages in tax, toll and currency procedures.

Sustainability and social responsibility are complicated matters that affect the designers on a personal and practical level. They juggle between their personal values and the competitive commercial environment in which they work. With their knowledge of the processes behind the fast fashion industry they see sustainable developments in the industry first-hand, but also see the need for more rapid development and the future implications of shifting values in consumers.

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With their knowledge of the processes behind the fast fashion industry the designers see the sustainable developments in the industry first-hand, but also see the need for more rapid development and the future implications of shifting values in consumers.



7 Conclusions

7.1 VALUE ADDED BY DESIGNER

The research question for my thesis study was how designers add value in the fast fashion process. I interviewed professional designers working in the fast fashion industry to answer this question.

The key finding of this study is the dual role designers have in adding value and implementing strategy. This dual role comprises the role of gatekeeper and the role of executor. These roles act as a pair for professional designers in their work, however the gatekeeping role is elevated and considered the main responsibility. Value is added in all the different phases of the fast fashion process and it is both intangible and tangible and can be translated directly to financial value in terms of turnover and profit. Intangible value is formed through customer satisfaction. It is an integral part of a brand’s value proposition and resonates with the customers in regards of function, emotion and self-expression.

The role of the customer is highlighted in the data. The customer defines the designer’s work in gatekeeping and executing. The customer is also driving changes in the industry. They appear to demand more new products faster and are participating in the phenomenon of trends going viral via social media by sharing and following. Customers are also linked to the future of fast fashion and are at the center of the discussion about changing values in society and sustainability issues. The customer is a strategic tool for designers to use in framing their focus.

Experience can also be seen as a strategic asset and a tool. Experience combined with intuition and intensive knowledge of trends is essential for designers to be able to understand emerging trend patterns and commercial potential. It is also a practical asset when working with product development.

Designer as gatekeeper

The role of designer as gatekeeper is strategic. Simply put, the designer is a gatekeeper between the trends and the end product using strategy, customer and brand as frame. Michael Porter says (cited in Borja De Mozota, 2003) that the essence of strategy is what not to do and this is evident in the choices the designers in this study make. The objective of the design profession is to make the strategy visible (Borja De Mozota, 2003). Borja de Mozota (2003) also writes that the first value of design is the development of ideas into concepts. Designers work constantly in projecting the brand and the customer needs into the future. The past is present as an inspiration, but it is always

addressed through the future needs and renewed aesthetics. This is both a creative and a strategic role, and the designers in my study see this as their main responsibility.

Designers are responsible for gathering and managing information relevant to their target market. They select from various sources of inspiration and make decisions about what is relevant to their customer and what to push forward to the process of product development. They use their intuition honed by experience to determine what are the right trends and triggers for their customer and the brand.

This study also shows that designers consider the timing of an idea in relation to their customer’s innovation adoption potential. They determine their design objectives (innovativeness, fashionability, mass-market potential) based on the phase of the design on the fashion cycle, as Borja De Mozota (2003) explains.

Part of the gatekeeping role is to convey the intangible ideas and gain acceptance for them inside their organization. They must be able to communicate and “sell” the trends and product ideas to other stakeholders. If this is not successful, the ideas will stay at the idea level and never become products.

Designer as executor

The executor role is based on the tangible value created by designers. It is about implementing strategy for products that represent the value proposition of the company. Even if the designers in my study emphasize the importance of the

gatekeeping role, the executing role is equally important for transforming ideas into real products.

In the executor role, the designer creates tangible value in products that match the inspiration from the trend and the strategy of the company. Designers must turn the source of inspiration into a new product that fits the brand and the financial targets in a way that is perceived valuable by the customer. Design can be seen as a means to express a brand’s values (Borja De Mozota, 2003).

This is the more visible and traditional part of a designer’s work and it is creative problem solving of the product inside a framework set by the customer, brand and company, industry, price and materials in an accelerated design process. Value is created by the choices the designer makes for the product and the balance they achieve between value driver, desirability and cost efficiency. These choices include the trend implemented, fit and overall feeling of the garment, materials and silhouette. As Borja De Mozota (2003) writes, design is a process of creation and decision-making. In this role, designers have the most concrete possibilities to create value because they affect cost breakdown with their choices.

Discussion

The dual role of the designer is a noteworthy finding of this study. It solidifies the importance of design as a strategic function and designers as strategic thinkers and doers in the fast fashion business. The roles are more than just academic. These roles exist in the practical work of

the designers in the industry on a daily basis, and designers switch between the roles seamlessly. Some designers seem more adept in the gatekeeping role, having more strategic capital and interest, but command of both roles is expected of fast fashion designers. Both the idea and the execution must be successful to add the value. Fashion bounces between the artistic and the commercial outcome and merges aesthetic, engineering and business strategy in a unique way (Nixon & Blakley, 2012). Indeed, design is not merely an output, but also a process (Borja De Mozota, 2003). I hope the findings of my study will also serve designers in understanding the value of their work and skills and see the possible applications of this capital in other fields.

This study shows that the designer’s role in the fast fashion industry is much more than product design. Fast fashion designers are creative and business-savvy designers who are sensitive to consumer needs and emerging trends. They are able to project their brand and customer needs into the future and create products with desirability and meaning beyond function on a continuous basis. The skills needed for a successful designer in a fast fashion environment, and the fashion industry in general, are not limited to garment design skills and material knowledge. They include a much wider set of forecasting, business, strategic and communications skills that designers must be able to use fluently in their daily activities in a professional setting. This elevates the importance of the gatekeeping role.

Many of these non-design skills can be labeled under “fashion thinking” (Nixon & Blakley, 2012. Fashion thinking is a means for brands and services to attain value by

incorporating the analytical and intuitive thinking from the fashion industry. Fashion answers the question “How can we make what people want?”. The term “design thinking” has become popular to characterize hybrid thinkers in organizations and fashion thinking is proposed as a model of thinking for something similar, but not simply an extension of design thinking (Nixon & Blakley, 2012).

Fashion thinking is very much connected to the gatekeeping role presented in my study. It is a paradigm of critical thought that features temporal, spatial and socially discursive dimensions. The same elements are intrinsically part of the gatekeeping role.

The temporal dimension of fashion thinking acknowledges and utilizes history and is responsive to customers’ needs and desires in the present moment. It also orients itself to the future and anticipates what might be coming next (Nixon & Blakley, 2012). Remixing fashion history with current trends and products in new ways is typical in fashion. Fashion thinkers try to achieve the right balance between serving your current customer and situating your product within a comprehensible historical context while gesturing toward the future (Nixon & Blakley, 2012).

Fashion trends have the power to cross class, racial and national boundaries. The most powerful trends can accomplish a kind of cultural diplomacy. Fashion, and fashion thinking, crosses physical distances and provides endless opportunities for designers and marketers to transcend those gaps and provide their customers surprising new products

and ideas that would have been hard to imagine emerging from one distinct place or cultural group. Fashion thinking involves harvesting the most interesting trends from the streets to the elite and mainstream (Nixon & Blakley, 2012). Utilization of social media is an important part of this modern trickle-up phenomenon.

The fashion industry is based on aesthetic judgments and fashion thinkers can be seen as tastemakers. Nixon and Blakley (2012) write that finding a way to harness the ability to decode patterns in behavior, values, and aesthetics is the key to the creation of differentiated products that are both on trend and reflective of a particular brand. This is a confirmation of the gatekeeping role that designers need to fulfill. As more industries outside the fashion industry are looking to become tastemakers and gatekeepers rather than supplicants looking for validation, the validity and value of fashion thinking becomes elevated. Nixon and Blakley (2012) predict that cultivating the intangible variables, which add value to the process, is going to become an even more crucial aspect of design, production, marketing and distribution of goods in the twenty-first century.

Designers in the fast fashion business have demonstrated excellent capacity for incorporating fashion-thinking abilities into their professional profile. The findings of my study support the idea of fashion thinking and present the fast fashion designers as fashion thinkers, especially through the gatekeeping role. Fashion designers should realize their full potential as creative, trend-sensitive, agile and adaptive creative, and venture with confidence into other industries.

7.2 SUSTAINABILITY DISCUSSION

Sustainable development and social responsibility are two of the most significant catalysts in the industry, affecting every practice of the fashion value chain through legislation, media visibility and consumer pressure and attitudes. Sustainability is also predicted to be a major trend in shaping the future of the fast fashion industry and consumer attitudes (Elkington, 2004; Li et al., 2014). The designers interviewed for this study agreed that the development of sustainable practices is critical for the future of fast fashion.

The fashion industry has had a heavy impact on the environment. The fast fashion industry in particular is often criticized for promoting overconsumption by offering highly trendy new products at an increased pace for low prices. This has undermined the value of clothing in the eyes of customers and has heavily influenced a throwaway culture (Ferrer, 2011; Fletcher, 2013). The volume of clothing produced by retailers also means a lot of textile waste and a heavy reliance on resources. Textile waste means both industrial waste and end-consumer waste; recycling of fast fashion products is still quite unusual (Ferrer, 2011; Fletcher, 2013; Pookulangara & Shepard, 2013). However, it is encouraging to see new technological innovations increasing in textile recycling in the end-consumer stage as well as in the pre-consumer stage.

Designers in my study talked about the sustainable materials they can promote and use in their work. Besides choosing environmental materials, designers can also take responsibility for their part in the production process. The fast fashion

model raises some concerns and risks for following CSR codes. The time used for the actual garment production cannot be cut in the fast fashion model, but it builds pressure towards the production process as well (Shepard & Pookulangara, 2013). The pressure for cutting lead times and a demand for lower prices increases the risk of CSR violations. Changes in orders is one of the most common risk factors on the purchasing side (Dickson et al., 2009). If the design is changed at a late stage, it can have consequences in the factory because the production can be already prepared and cut according to the previous sample stage. If there is a change to the design at this stage, some of the work has to be made again and the risk for delay increases. This can pressure the supplier to demand overtime from their employees or lead to unauthorized subcontracting (Dickson et al., 2009). The designers and buyers making these decisions should understand the consequences of these actions. Gladly this is discussed widely inside companies, as my own experiences in the industry have shown.

Opportunities in the more local production aspect of fast fashion products was brought up in the interviews. Reports on European and American fashion brands re-shoring their production closer to home for cost, flexibility, quality, delivery, sustainability surveillance and marketing reasons have been reported in the press in recent years (Gibson, 2014; Ruddick, 2013; Wee, 2013). This seems to be a trend at least for some parts of the industry as wages in Asia – especially China – rise, fashion trends become more unpredictable, and companies need to be able to react fast. There is the example of Zara, which has kept most of its production in

Spain and Portugal and is known for extremely efficient reaction to market needs (Gibson, 2014; Ruddick, 2013). Some Italian companies report that their need for large volumes have shifted to more varied product ranges in smaller quantities with fast delivery to market (Za, 2014).

The shift to bring production closer to home has resulted also in the increase of clothing manufacturing jobs in Europe and the US (Wee, 2013). The British fast fashion retailer Topshop has offered a limited “Made in Britain” collection in their flagship stores in London and New York, as well as online since 2012 (topshop.com, 2012). Similarly, H&M debuted with organic leather from Swedish farms for their Conscious Collection in March 2014 (www.fibretofashion.com).

This re-shoring movement is relatively new but already seems to be making an impact on the fashion industry and it seems that fast fashion companies are trying to position themselves as forerunners even with marginal gestures. It will be interesting to see what the changing dynamics in the fashion industry will produce in terms of new sustainability-focused business models.

Many sustainability issues are not just about processes and product design, but also the design of the corporations and business ecosystems. It is important that companies shift the sustainability agenda from public relations to competitive advantage and corporate governance (Elkington, 2004).

Fletcher (2013) argues that business models that are based on constant growth cannot be sustainable by nature.

Fashion is full of contradictions as consumers express their interest in sustainable fashion but continue to be drawn to cheap and trendy options (Pookulangara & Shepard 2013).

It seems that most of the options offered to fast fashion companies as alternatives to current practices (like zero-waste pattern cutting or using post-consumer waste directly) are still quite marginal and or not scalable enough for global companies. It could also be that innovative sustainable thinkers are positioned far from the fast fashion industry and global companies. Many of the writings on sustainable design (Ferrer, 2011; Fletcher, 2013) show a lot of bias against the fast fashion industry. The issues raised are important, but it could be more productive to collaborate with the fast fashion companies to hopefully narrow the gap between the extremes and hasten the development of sustainable innovations on a global scale.

Many of the issues regarding overconsumption and consumer trends towards even more sustainable and long lasting consumption remain to be seen. Consumers have a pivotal role in shaping the future of fast fashion. The fashion industry is quick to adapt to new innovations and introduce them to consumers and I hope that sustainable innovations will be fixed on this agenda. The fashion industry could also be quicker to adopt innovations from the service industry and provide non-material fashion experiences to trend-hungry consumers.

7.3 IMPLICATIONS FOR PRACTICE AND FURTHER RESEARCH

My findings position the fashion designer profession to be about much more than just product design. Designers in the industry must be able to perform in the strategic gatekeeping role, as well as in the more traditional executor role. The skills needed for the gatekeeping role require more strategic and adaptive thinking.

In fashion design education these fashion-thinking skills should be taught to prepare graduating designers for working life. To succeed it is not enough to be a brilliant and innovative fashion designer. The ability to utilize creativity, industrial, business and forecasting skills, combined with good design skills is useful in all sectors of the design industry, from creating your own brand to working for a global retailer. One possible way to achieve this at university level could be to establish good internship programs with notable companies and add interdisciplinary projects and courses to the curriculum. By doing so fashion students would be able to notice the strength of their thinking outside the fashion setting.

In business this could mean even wider acceptance of fashion thinking. Industries, that are sensitive to consumer demand, like consumer electronics, hotels and restaurants and food industries, could take advantage of the fashion designers' ability to fuse business, forecasting, creative and customer driven approach to agile product development and innovation (Nixon & Blakley, 2012). This would also require fashion designers to embrace these new career opportuni-

ties and possibilities to apply their skills in new industries outside the fashion industry.

This study also suggests interesting opportunities for future research. Design in the fast fashion environment still remains quite understudied, so there is definitely room for more on the topic. The gatekeeping role, especially, deserves more attention in future research.

The findings of this study are based on interviews. The value added by the dual designer roles could be followed up on a practical level during one season. This could provide more concrete financial results and also provide insights about the time designers use for the different roles. This information could help further develop the position of design inside an organization.

This study was made with a limited set of companies and designers. It would add to the generalizability of the results if a similar study would be made with other companies and designers, like US companies or the British high street companies. A larger number of participants in future studies would be recommended. Comparisons could also be made based on the size of the company or geographic location. One possibility would also be to choose participants from even more senior level designers and design managers as well as junior designers. A follow up study in 5 years could be interesting since the industry is developing at a fast pace.

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